

MEDIA RELEASE

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La Trobe Financial Appoints Tim Wood as Head of Listed Equities

In a series of new, high-level executive appointments, La Trobe Financial today announced the appointment of Tim Wood as their new Head of Listed Equities.

Speaking on the appointment, Chris Paton, Chief Investment Officer at La Trobe Financial stated *"With over 20 years of global investment expertise, Tim will play a pivotal role within our team in leading our listed equities strategies. This capability has been developed as we build a suite of high-quality investment solutions for our investors"*.

Tim's career spans key financial hubs around the world, including Melbourne, London, Hong Kong, and Sydney, where he has contributed significantly across the investment management and private wealth sectors.

His expertise is rooted in helping clients achieve their investment and retirement goals through prudent, diversified, and lower-volatility equity investing—an approach that complements La Trobe Financial's disciplined investment strategy.

The firm is expanding its leadership team as it continues to enhance its investment offerings. In recent weeks, 3 high level appointments have been announced, all dedicated to assisting in the company in their trajectory toward \$30 billion in assets under management.

Tim's appointment is part of La Trobe Financial's broader strategy to expand its investment management capabilities and deliver innovative solutions that meet the evolving needs of investors. In addition to its established La Trobe Australian Credit Fund—the largest retail credit fund in Australia—the company launched its La Trobe Global Asset Management strategy in 2023, along with its first product, US Private Credit Fund. More recently, La Trobe announced the development of the La Trobe Australian Real Estate Fund, and is preparing to enter the listed equities space in the near future.

"We are thrilled to have Tim on board," said Chris Paton. "His extensive experience and global perspective will be an asset to our team, our partners and investors. We are confident that Tim's leadership will strengthen our ability to provide superior investment outcomes in listed equities and contribute to La Trobe Financial's continued growth."

To find out more visit 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 over A\$20 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 110,000 investors[^] – including some of the world's largest financial institutions – and 4,500 supporting financial advisers.

La Trobe Financial's retail asset management business is spearheaded by the c.\$13bn 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

Disclaimer

La Trobe Financial is regulated by the Australian Securities & Investments Commission (ASIC) and holds the requisite regulatory AFSL and ACL to operate managed investment schemes, place RMBS issuances, and provide credit services.

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Past performance is not a reliable indicator of future performance.

[^]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 trusts or SMSFs.

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