

## **MEDIA RELEASE**

**Date: 24/4/25**

### **La Trobe Financial Strengthens Executive Team with Strategic Appointments to Support Continued Growth**

La Trobe Financial, Australia's premier alternative asset manager, is pleased to announce the appointment of two senior executives, David Tagg and Catherine Donatiello, further enhancing its leadership bench as the company continues its trajectory of sustained growth and expanded investment offerings.

David Tagg has been appointed Head of Investments, bringing over 30 years of experience across funds management, wealth management, and investment banking. Prior to joining La Trobe Financial, David held several senior leadership roles at the Commonwealth Bank of Australia (**CBA**), including Head of Wholesale Investments and Chief Investment Officer of Commonwealth Private Bank.

Catherine Donatiello also joins the executive ranks as Head of Product Support, bringing extensive expertise in financial services and client experience, further deepening La Trobe Financial's strategic capability.

Both David and Catherine bring significant industry knowledge and a track record of delivering results at the highest level.

These appointments form part of a broader strategic initiative for the firm aimed at deepening its executive capability. Several additional senior appointments will be announced in coming weeks as La Trobe Financial continues to invest in talent to support its expanding product suite.

Chris Paton, Chief Investment Officer of La Trobe Financial, welcomed the appointments, "we are delighted to have David and Catherine join our team. They add to the scale and experience of our already highly respected executive group and position us strongly for the next phase of our growth."

La Trobe Financial currently manages more than \$20 billion in assets under management (**AUM**) on behalf of a diversified client base that includes major institutions, domestic and international banks, family offices, high-net-worth individuals, and retail investors. Its flagship fund, the La Trobe Australian Credit Fund, is almost \$13 billion AUM, making it the largest retail credit fund in Australia.

The firm also launched its La Trobe Global Asset Management Strategy which has seen the successful launch of its US Private Credit Fund (retail and wholesale).

With the addition of these proven leaders, and more to follow, La Trobe Financial continues to reinforce its position as a market leader in alternative asset management.

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 over A\$20 billion of assets under management.

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<sup>^</sup> – 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\*.

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