



The Public Trustee (PT) Gifts and Benefits Register for 1 October 2019 – 31 December 2019¹

Date received /given	Description of gift or benefit	Value (\$)	Name of donor	Name of recipient	Was the gift retained by employee (A) or PT (B)?	Reason for accepting/giving (benefit to the Queensland community)	Name of accountable officer or supervisor
GIFTS RECEIVED							
19.09.19 ²	Ticket to the 3 rd EA PA Roadshow 2019	104.50	Public Sector Network	Seané Shalev – Executive Support Officer, Office of the CEO	A	The roadshow afforded an opportunity to network with Government stakeholders and to gain insight into the experiences and challenges of other executive and personal assistants.	Samay Zhouand – A/Public Trustee of Queensland and CEO
11.10.19	TeamMate User Forum	138.60	TeamMate Australia	Etienne Geringer – Head of Internal Audit	A	The forum provided updates on upcoming enhancements and the TeamMate roadmap, and shared best practice observations.	Samay Zhouand – A/Public Trustee of Queensland and CEO
11.10.19	TeamMate User Forum	138.60	TeamMate Australia	Troy Davison – Principal Advisor, Internal Audit	A	The forum provided updates on upcoming enhancements and the TeamMate roadmap, and shared best practice observations.	Samay Zhouand – A/Public Trustee of Queensland and CEO
11.10.19	TeamMate User Forum	138.60	TeamMate Australia	Jerry Bongard – Internal Audit Data Specialist	A	The forum provided updates on upcoming enhancements and the TeamMate roadmap, and shared best practice observations.	Samay Zhouand – A/Public Trustee of Queensland and CEO
17.10.19	End of Year Client Function	60.00	Crown Law	Kathryn Williams – A/Official Solicitor	A	The presentations made by Crown Law’s senior legal staff in relation to the <i>Human Rights Act 2019</i> and misuse of confidential information are of direct relevance to the work of the PT.	Samay Zhouand – A/Public Trustee of Queensland and CEO
17.10.19	End of Year Client Function	60.00	Crown Law	Samay Zhouand – A/Public Trustee of Queensland and CEO	A	The presentations made by Crown Law’s senior legal staff in relation to the <i>Human Rights Act 2019</i> and misuse of confidential information are of direct relevance to the work of the PT.	Josephine Giles – Senior Director, Governance & Risk
23.10.19	Economic Luncheon	84.50	Westpac	Christine Ivic – A/Manager, Funds Management	A	Westpac’s Chief Economist, Bill Evans, discussed the state of the domestic and global economies plus forecasts for key currency and interest rate markets, which all impact on the PT’s Common Fund.	Justine Callaghan - Executive Director, Investment & Finance Services & CFO
23.10.19	Economic Luncheon	84.50	Westpac	Frank Prostamo – Director, Investment & Taxation Services	A	Westpac’s Chief Economist, Bill Evans, discussed the state of the domestic and global economies plus forecasts for key currency and interest rate markets, which all impact on the PT’s Common Fund.	Justine Callaghan - Executive Director, Investment & Finance Services & CFO
30.10.19	Two coffee mugs	29.80	QATSIF	Cheryl Smith – A/Regional Manager, Townsville	A	Accepted as a matter of courtesy to foster goodwill.	Amanda MacDougall – Executive Director, Client Experience & Delivery

1. Gifts valued at under \$150 are included where the aggregate from a donor/similar donor exceeds \$150 in the financial year.
2. This item should have been reported in the register for 1 July 2019 – 30 September 2019.



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07.11.19	Capital Markets Lunch	90.00	Frontier Advisors Pty Ltd	Frank Prostamo – Director, Investment & Taxation Services	A	The lunch presentation on economic and market update informed the development of the investment strategy for the Common Fund.	Justine Callaghan - Executive Director, Investment & Finance Services & CFO
15.11.19	QIC Christmas Twilight Seminar	60.00	Queensland Investment Corporation	Robert Manning – A/Investments Administration Supervisor	A	The economic commentary provided was relevant to the PT's Growth Trust.	Justine Callaghan - Executive Director, Investment & Finance Services & CFO
16.11.19	End of Year Client Function	60.00	Crown Law	Leanne Matheson – Senior Director, Human Resource Services	A	The presentations made by Crown Law's senior legal staff in relation to the <i>Human Rights Act 2019</i> and misuse of confidential information are of direct relevance to the work of the PT.	Samay Zhouand – A/Public Trustee of Queensland and CEO
18.11.19	Capital Markets Lunch	90.00	Frontier Advisors Pty Ltd	Christine Ivic – A/Manager, Funds Management	A	The lunch presentation on economic and market update informed the development of the investment strategy for the Common Fund.	Justine Callaghan - Executive Director, Investment & Finance Services & CFO
02.12.19	QTC Foreign Exchange Workshop	620.00	Queensland Treasury Corporation	Robert Manning – A/Investments Administration Supervisor	A	The workshop topic is relevant to the work of the Funds Management team in developing budgets, forecasts and strategy.	Samay Zhouand – A/Public Trustee of Queensland and CEO

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