

# Long-form expenditure summary for the 2022/23 financial year

## Short-form summary of expenditure for Equip Super for the 2022-23 financial year

The detailed list below shows cash payments made during the 2022-23 financial year.

Total expenditure for the financial year 2022-23*	Amount (\$)
Aggregate remuneration expenditure	\$5.2 million
Aggregate promotion, marketing, or sponsorship expenditure	\$2.4 million
Aggregate political donations	NIL
Aggregate industrial body payments	\$0.02 million
Aggregate related party payments	\$135.5 million

\*The expenditure in this table is a summary of payments in relation to all divisions of Equip Super in the year ended 30 June 2023, including Catholic Super. The amounts presented are net of any applicable GST claims.

As these payments are presented on a cash basis, the amounts will vary from those shown in the Fund's 2022-23 financial statements, which were prepared on an accruals basis.

### Notes to the short-form expenditure summary for the 2022-23 financial year

Please note that due to the way the expenditure categories are defined in superannuation regulations, some expenditure items are counted in more than one category.

- **Aggregate remuneration expenditure:** this includes the remuneration for Equip Super's Chief Executive Officer and all group Executive Officers as well as fees paid to Directors. Further information about this remuneration is available on our website.
- **Aggregate promotion, marketing or sponsorship expenditure:** this includes promotional and educational materials, media, advertising, and partnership arrangements.
- **Aggregate political donations:** Equip Super does not make political donations.
- **Aggregate industrial body payments:** these include payments to organisations registered under the Fair Work (Registered Organisations) Act 2009. These are payments for marketing, membership and staff training.
- **Aggregate related party payments:** these occur when payments are made to Equip Super-related entities for business operations, or when a Director of Equip Super is a director or former partner of an organisation which provides services to Equip Super. Payments include Trustee services, investment management services, financial planning services, and group Executive Officers and Directors' remuneration (including \$5.2 million also disclosed in "Aggregate remuneration expenditure"). More detail on related party payments is available in our Annual Financial Statements.

# Long-form expenditure summary for the 2022/23 financial year

## Payments made for promotion, marketing or sponsorship

Supplier	Amount (\$)	Nature of transaction
Australia Post	34,988.40	Member communications
Carissa Clee	2,340.00	Member communications
Chandler CK Communications Group Pty Ltd	40,736.16	Member communications
Chant West	53,948.03	Market Research
CoreData Pty Ltd	100,000.00	Market Research
Customer Service Benchmarking Australia	162,570.63	Market Research
Eastern Press Pty Ltd	86,193.23	Member communications
Google Australia Pty Limited	69,675.62	Fund promotion
Hearts and Science Pty Ltd	294,695.13	Fund promotion
Icon Agency	173,572.40	Fund promotion
Immij Pty Ltd	80,855.73	Member communications
IVE Group Victoria Pty Limited	3,412.50	Member communications
Julia Nance Portraits	7,270.00	Member communications
Laneway Analytics Pty Ltd	10,200.00	Market Research
Loghic Connect	5,750.00	Member communications
Lynton Crabb Photography	45,280.00	Fund promotion
Mayflower Consulting	123,125.00	Product disclosure
McCorkell & Associates	24,300.00	Member communications
Meltwater Australia Pty Ltd	27,671.00	Fund promotion
Milo's in Good Company Pty Limited	380,026.88	Fund promotion
Money 101 - Money for Life Pty Ltd	66,600.00	Member communications
Monster & Bear Pty Ltd	45,600.00	Member communications
Ponnampalam & Chapman Pty Ltd	32,000.00	Member communications
Presentation Design Co	14,000.00	Member communications
PwC	20,000.00	Consultancy fees
QUALTRICS LLC	65,490.00	Market Research
Rainmaker Information	31,250.00	Fund promotion
Redback Connect	7,247.50	Member communications
SFDC Australia Pty Limited	8,451.30	Member communications
SGY Agency	25,844.00	Member communications
Signific (Australia) Pty Ltd	2,609.30	Fund promotion
Spark Green Holding Pty Ltd	45,370.00	Member communications
SuperRatings Pty Ltd	111,507.84	Market research
The Heron Partnership	550.00	Fund promotion
Tracey Skinner	12,006.25	Member communications
VIDPOD	107,300.00	Member communications
Willis Towers Watson	3,685.00	Consultancy Fees
<b>Total</b>	<b>2,326,121.90</b>	
<b>Rounded</b>	<b>\$2.4m</b>	

# Long-form expenditure summary for the 2022/23 financial year

## Gifts and donations made to political entities

Recipient	Amount (\$)	Nature of transaction
Nil	-	

## Payments to industry bodies or trade associations

Recipient	Date of payment	Amount (\$)	Nature of transaction
Traffic Management Association of Australia (TMAA)	15/8/2022	16,500.00	Sponsorship
Total		16,500.00	
Rounded		0.02m	

## Payments to related parties

Recipient	Date of payment	Amount (\$)	Nature of transaction
Togethr Trustees Pty Ltd			
	06/07/2022	3,240,163.30	Trustee services
	06/07/2022	4,614,993.90	Trustee services
	05/08/2022	1,221,534.36	Trustee services
	05/08/2022	884,559.36	Trustee services
	23/08/2022	3,240,163.30	Trustee services
	23/08/2022	4,614,993.90	Trustee services
	21/09/2022	4,614,993.90	Trustee services
	21/09/2022	3,240,163.30	Trustee services
	28/10/2022	4,614,993.90	Trustee services
	28/10/2022	3,240,163.30	Trustee services
	14/12/2022	3,240,163.30	Trustee services
	14/12/2022	4,614,993.90	Trustee services
	25/01/2023	3,240,163.30	Trustee services
	25/01/2023	4,614,993.90	Trustee services
	28/02/2023	3,240,163.30	Trustee services
	28/02/2023	4,614,993.90	Trustee services
	30/03/2023	3,240,163.30	Trustee services
	30/03/2023	4,614,993.90	Trustee services
	26/05/2023	2,552,000.00	Trustee services
	26/05/2023	1,848,000.00	Trustee services
	09/06/2023	462,000.00	Trustee services
	09/06/2023	638,000.00	Trustee services
	14/06/2023	2,442,000.00	Trustee services

# Long-form expenditure summary for the 2022/23 financial year

## Payments to related parties

Recipient	Date of payment	Amount (\$)	Nature of transaction
Togethr Trustees Pty Ltd – continued			
	16/06/2023	231,000.00	Trustee services
	16/06/2023	319,000.00	Trustee services
	22/06/2023	1,386,000.00	Trustee services
	22/06/2023	1,914,000.00	Trustee services
	23/06/2023	138,600.00	Trustee services
	23/06/2023	191,400.00	Trustee services
	30/06/2023	583,800.00	Trustee services
	30/06/2023	806,200.00	Trustee services
<b>Total</b>		<b>\$78,459,351.32</b>	
Togethr Asset Management Pty Ltd			
	18/07/2022	164,229.51	Investment Management services
	29/07/2022	2,192,296.91	Investment Management services
	08/08/2022	8,639,028.55	Investment Management services
	17/08/2022	3,816,482.47	Investment Management services
	30/08/2022	959,009.50	Investment Management services
	19/09/2022	771,173.37	Investment Management services
	24/10/2022	2,016,704.09	Investment Management services
	02/11/2022	4,247,314.77	Investment Management services
	10/11/2022	596,032.02	Investment Management services
	15/11/2022	452,573.95	Investment Management services
	23/11/2022	2,910,818.19	Investment Management services
	29/11/2022	610,605.02	Investment Management services
	14/12/2022	195,447.11	Investment Management services
	20/12/2022	1,109,582.96	Investment Management services
	12/01/2023	70,791.95	Investment Management services
	25/01/2023	4,191,853.40	Investment Management services
	01/02/2023	1,446,310.50	Investment Management services
	08/02/2023	3,177,053.18	Investment Management services
	23/02/2023	1,318,883.06	Investment Management services
	28/02/2023	792,992.50	Investment Management services
	16/03/2023	354,391.03	Investment Management services
	02/05/2023	7,285,973.73	Investment Management services
	16/05/2023	2,782,777.62	Investment Management services
	30/05/2023	736,989.95	Investment Management services
	16/06/2023	184,551.20	Investment Management services
<b>Total</b>		<b>\$51,023,866.54</b>	

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## Payments to related parties

Recipient	Date of payment	Amount (\$)	Nature of transaction
Togethr Financial Planning Pty Ltd			
	28/07/2022	195,066.85	Financial Planning services
	28/07/2022	195,066.85	Financial Planning services
	30/08/2022	195,066.85	Financial Planning services
	30/08/2022	195,066.85	Financial Planning services
	29/09/2022	195,066.85	Financial Planning services
	29/09/2022	195,066.85	Financial Planning services
	27/10/2022	195,066.85	Financial Planning services
	27/10/2022	195,066.85	Financial Planning services
	28/11/2022	195,066.85	Financial Planning services
	28/11/2022	195,066.85	Financial Planning services
	21/12/2022	390,133.70	Financial Planning services
	19/01/2023	57,823.76	Financial Planning services
	31/01/2023	165,000.00	Financial Planning services
	31/01/2023	165,000.00	Financial Planning services
	28/02/2023	165,000.00	Financial Planning services
	28/02/2023	165,000.00	Financial Planning services
	30/03/2023	165,000.00	Financial Planning services
	30/03/2023	165,000.00	Financial Planning services
	28/04/2023	165,000.00	Financial Planning services
	28/04/2023	165,000.00	Financial Planning services
	31/05/2023	165,000.00	Financial Planning services
	31/05/2023	165,000.00	Financial Planning services
	30/06/2023	92,500.00	Financial Planning services
	30/06/2023	92,500.00	Financial Planning services
<b>Total</b>		<b>\$4,233,625.96</b>	
Allens			
	12/08/2022	13,200.00	Legal services
	25/08/2022	247,526.44	Legal services
	08/09/2022	44,816.42	Legal services
	15/09/2022	33,000.00	Legal services
	14/10/2022	3,887.00	Legal services
	18/11/2022	57,099.54	Legal services
	25/11/2022	47,577.20	Legal services
	30/11/2022	36,623.03	Legal services
	19/01/2023	120,831.30	Legal services
	27/01/2023	23,324.95	Legal services
	17/02/2023	57,557.50	Legal services
	03/03/2023	165,000.00	Legal services

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## Payments to related parties

Recipient	Date of payment	Amount (\$)	Nature of transaction
<b>Allens - continued</b>			
	24/03/2023	11,176.00	Legal services
	14/04/2023	19,529.40	Legal services
	19/05/2023	5,517.22	Legal services
	31/05/2023	3,300.00	Legal services
	09/06/2023	9,624.45	Legal services
	23/06/2023	136,602.40	Legal services
	30/06/2023	5,211.25	Legal services
<b>Total</b>		<b>1,041,404.10</b>	
<b>Australian Council of Superannuation Investors (ACSI)</b>			
	21/02/2023	79,941.40	Voting services
	23/06/2023	336,347.00	Membership fees
<b>Total</b>		<b>416,288.40</b>	
<b>Lancaster Partners Pty Ltd</b>			
	19/08/2022	15,840.00	Consulting services
	08/09/2022	22,770.00	Consulting services
	14/10/2022	21,780.00	Consulting services
	11/11/2022	33,660.00	Consulting services
	16/12/2022	33,660.00	Consulting services
	12/01/2023	25,740.00	Consulting services
	17/02/2023	31,680.00	Consulting services
	09/03/2023	32,760.00	Consulting services
	14/04/2023	35,640.00	Consulting services
	12/05/2023	27,720.00	Consulting services
	09/06/2023	38,610.00	Consulting services
	30/06/2023	37,620.00	Consulting services
<b>Total</b>		<b>357,480.00</b>	
<b>GRAND TOTAL – all related party payments</b>		<b>\$135,532,016.32</b>	
<b>Rounded</b>		<b>\$135.5m</b>	