

## Thursday, 4 Oct. 2018, 6:00-7:00 PM "19<sup>th</sup> UTS Ethics in Finance Panel Discussion"



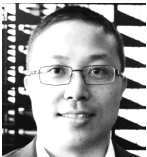
Sydney financial professionals will meet at UTS to discuss the **CFA Institute Standards of Professional Conduct** and ethics in finance.



**Hanna Ebeling, CFA** (Social Enterprise Finance Australia)  
**Jordan Taylor, CFA** (LGT Capital Partners)



**Julia Weng, CFA** (First State Super)  
**Charles Wu, CFA** (State Super)



### When?

Thursday,  
4 Oct. 2018

### Time:

6:00PM – 7:00PM

### Where?

UTS Building 5  
(Haymarket)  
Building 5, Block B  
Level 1, Room 002  
CB05B.01.002

### Visit the event to learn about:

- *The CFA Institute Standards of Professional Conduct*
- *Application to real world finance*
- *How to avoid pitfalls when making decisions in finance*
- *Job application tips for a career in finance*

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## “19<sup>th</sup> UTS Ethics in Finance Panel Discussion”

### **Hanna Ebeling, CFA**

#### **Social Enterprise Finance Australia (Head of Portfolio Management)**



Hanna Ebeling is Head of Portfolio Management at SEFA where she leads a team who works closely with mission-driven organisations on developing financial solutions or investment readiness services to suit their needs. Prior to Australia, Hanna spent two years in the Philippines, managing a social enterprise accelerator program for LGT Impact Ventures and launching an affordable bamboo housing business with United Nations and the Hilti Foundation. Hanna holds a B.A. in Economics from the University of St.Gallen, Switzerland, and is a CFA charterholder. She is a graduate of the Australian Institute of Company Directors and is a non-executive Director of Woodville Alliance Ltd and Ceres Organics Australia Pty Ltd.

### **Jordan Taylor, CFA**

#### **LGT Capital Partners (Associate Director)**



Jordan Taylor is an Associate Director at LGT Capital Partners, a Swiss-based alternative asset manager with US\$60bn in AUM. In his role at LGT Capital Partners, Jordan is responsible for client servicing and investment sourcing across Australia and New Zealand. Prior to LGT, Jordan worked for five years in investment consulting at Willis Towers Watson, in their Investment Strategy team. Jordan holds a Bachelor of Business Studies from Massey University, and is a CFA charterholder.

### **Julia Weng, CFA**

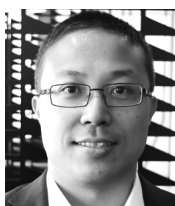
#### **First State Super (Associate Portfolio Manager)**



Julia Weng is Associate Portfolio Manager – Direct Equities at First State Super. She is responsible for equity research of the ASX300 Industrials sectors and development of the internally managed Australian concentrated equities strategy. Prior to First State Super, Julia was a senior research associate at Morgan Stanley covering Transport & Infrastructure sectors and has also worked as a quantitative analyst at Macquarie, and actuarial consultant at PricewaterhouseCoopers, as well as running her own bakery. Julia holds the Chartered Financial Analyst designation and is a Graduate of the Australian Company Institute of Directors (GAICD) and holds a Bachelor of Commerce (Actuarial Studies) from Macquarie University.

### **Charles Wu, CFA (State Super)**

#### **State Super (General Manager Asset Allocation)**



Charles Wu joined State Super in 2015. In his role as General Manager Asset Allocation, Charles is responsible for formulating investment strategy to assist members in achieve return objectives on a risk-adjusted basis. He was previously an Investment Manager at Media Super and an analyst at Mercer. Charles holds a Master of Commerce and a Bachelor of Computer Engineering, and is a CFA charterholder. He also serves as a Vice President and the Director of University Outreach at CFA Society Sydney.