Long-form expenditure summary for the 2025-26 financial year

Short-form summary of expenditure for Catholic Super for the 2025-26 financial year

Total expenditure for the financial year 2025-26 *	Amount ($)
Aggregate remuneration expenditure	$6.59 million
Aggregate promotion, marketing, or sponsorship expenditure	$6.12 million
Aggregate political donations	NIL
Aggregate industrial body payments	NIL
Aggregate related party payments	$162.5 million

* The expenditure in this table is a summary of payments in relation to all divisions of the Fund in the year ended 30 June 2026, including Catholic Super. The amounts presented are inclusive of GST where applicable.

Notes to the short-form expenditure summary for the 2025-26 financial year

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

Aggregate remuneration expenditure: this includes the remuneration for Catholic 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: Catholic Super does not make political donations.

Aggregate industrial body payments: Catholic Super did not make any payments to industrial bodies.

Aggregate related party payments: these occur when payments are made to Catholic Super-related entities for business operations, or when a Director of Catholic Super is a director or former partner of an organisation which provides services to Catholic Super. Payments include Trustee services **($94.2m),** investment management services **($61.9m),** financial planning services **($4.2m),** and group Executive Officers and Directors' remuneration (also disclosed in "Aggregate remuneration expenditure"). More detail on related party payments is available in our Annual Financial Statements.

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Payments made for promotion, marketing or sponsorship

Supplier	Amount ($)	Nature of transaction
Association of Ministerial PJPs	2,750.00	Fund promotion
Australia Post	69,206.56	Member communications
Australian Catholic Bishops Conference	15,222.50	Fund promotion
Banner Lady (Danpen Pty Ltd)	1,503.15	Fund promotion
Catholic Archdiocese of Melbourne	11,000.00	Fund promotion
Catholic Archdiocese of Sydney	32,780.00	Fund promotion
CATHOLIC DIOCESE OF CAIRNS	1,100.00	Fund promotion
Catholic Mission	5,500.00	Fund promotion
Catholic Social Services NSW/ ACT	5,500.00	Fund promotion
chandler	105,614.82	Member communications
cummins&partners	4,478,454.48	Fund promotion
Customer Service Benchmarking Australia	209,378.99	Market research
Danpen Pty Ltd	1,002.65	Fund promotion
Diocesan Outreach & Mission Services Div	2,200.00	Fund promotion
Diocese of Cairns (Catholic Development)	1,100.00	Fund promotion
Diocese of Lismore	4,400.00	Fund promotion
Eastern Press	93,779.71	Member communications
Ernst & Young	76,175.00	Consultancy fees
Getty Images Sales Australia Pty Ltd	12,787.50	Fund promotion
Gladstone Regional Council	2,437.44	Fund promotion
GM Sponsors	6,600.00	Fund promotion
I AM HELIUM PTY LTD	10,725.00	Fund promotion
ICONINC HOLDINGS PTY. LTD.	169,933.50	Fund promotion
International Pty Ltd	95,700.00	Market research
IVE Group Victoria Pty Limited	5,881.69	Member communications
Julia Nance Portraits	6,493.30	Fund promotion
Mayflower Consulting Pty Ltd	78,299.93	Product disclosure
McCorkell Group Pty Ltd	9,900.00	Fund promotion
Melbourne Archdiocese Catholic Schools	82,500.00	Fund promotion
Meltwater Australia Pty Ltd	101,427.70	Market research
Mercer Consulting (Australia) Pty Ltd	106,700.00	Consultancy fees
Money101 Money for Life Pty Ltd	58,985.84	Member communications
Outgrow (VenturePact LLC)	11,086.08	Fund promotion
Qualtrics LLC	71,910.30	Market research
RACV City Club	3,345.99	Staff development
Royal Automobile Club of Victoria (RACV)	3,850.00	Staff development
Spark Green Holdings Pty	8,184.00	Member communications
SUPERRATINGS PTY LIMITED	18,837.50	Market research
SuperRatings Pty Ltd	48,250.31	Market research
Think Business Events ITF TMS 2025	2,500.00	Fund promotion
Towers Watson Australia Pty Ltd	2,145.00	Consultancy fees
Tracey Skinner	8,415.00	Member communications
Valiant Press Pty Ltd	35,280.84	Member communications
VIDPOD	1,650.00	Member communications
Visual Graphics	1,232.00	Member communications
WE Group Victoria Pty Limited	16,544.89	Member communications
Willett Marketing Pty Ltd	5,610.00	Fund promotion
Zenith CW Pty Ltd (Chant West)	19,383.14	Fund promotion
Total	**$2,450,703.52**	
Rounded	**$2.45 million**	

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Gifts and donations made to political entities

Recipient	Amount ($)	Nature of transaction
Nil	-	

Payments to industry bodies or trade associations

Recipient	Amount ($)	Nature of transaction
Nil	-	

Payments to related parties

Recipient	Date of payment	Amount ($)	Nature of transaction
Togethr Trustees Pty Ltd			
	07/07/2025	7,720,483.00	Trustee services
	31/07/2025	1,040,499.92	Trustee services
	11/08/2025	7,720,483.00	Trustee services
	04/09/2025	7,720,483.00	Trustee services
	10/10/2025	7,720,483.00	Trustee services
	12/11/2025	7,720,483.00	Trustee services
	04/12/2025	7,720,483.00	Trustee services
	08/01/2026	7,720,483.00	Trustee services
	12/02/2026	7,720,483.00	Trustee services
	11/03/2026	7,720,483.00	Trustee services
	09/04/2026	7,720,483.00	Trustee services
	11/05/2026	7,720,483.00	Trustee services
	11/06/2026	1,100,000.00	Trustee services
	25/06/2026	6,600,000.00	Trustee services
	30/06/2026	550,000.00	Trustee services
Total		**$94,215,812.92**	

Long-form expenditure summary for the 2025-26 financial year

Payments to related parties

Recipient	Date of payment	Amount ($)	Nature of transaction
Togethr Asset Management Pty Ltd			
	22/09/2025	14,739,567.05	Investment Management services
	19/02/2026	15,734,063.15	Investment Management services
	24/04/2026	16,077,314.96	Investment Management services
	25/06/2026	15,359,086.41	Investment Management services
Total		**$61,910,031.57**	

Recipient	Date of payment	Amount ($)	Nature of transaction
Togethr Financial Planning Pty Ltd			
	31/07/2025	412,500.00	Financial Planning services
	28/08/2025	412,500.00	Financial Planning services
	28/08/2025	15,042.00	Financial Planning services
	28/08/2025	104,322.90	Financial Planning services
	30/09/2025	412,500.00	Financial Planning services
	28/10/2025	412,500.00	Financial Planning services
	27/11/2025	412,500.00	Financial Planning services
	01/12/2025	412,500.00	Financial Planning services
	29/01/2026	412,500.00	Financial Planning services
	25/02/2026	412,500.00	Financial Planning services
	30/04/2026	110,000.00	Financial Planning services
	28/05/2026	275,000.00	Financial Planning services
	30/06/2026	449,166.00	Financial Planning services
Total		**$4,253,530.90**	

Recipient	Date of payment	Amount ($)	Nature of transaction
Australian Council of Superannuation Investors (ACSI)			
	02/06/2026	375,230.90	Membership fees
	01/12/2025	90,787.40	Voting service
Total		**$466,018.30**	

Long-form expenditure summary for the 2025-26 financial year

Payments to related parties

Recipient	Date of payment	Amount ($)	Nature of transaction
Allens			
	18/06/2026	3,752.60	Legal services
	15/06/2026	7,419.75	Legal services
	05/05/2026	9,597.56	Legal services
	28/04/2026	59,875.20	Legal services
	23/03/2026	34,340.68	Legal services
	02/03/2026	7,369.07	Legal services
	05/02/2026	3,394.71	Legal services
	18/12/2025	33,000.00	Legal services
	12/12/2025	10,518.53	Legal services
	26/11/2025	22,735.68	Legal services
	07/11/2025	3,188.13	Legal services
	05/11/2025	14,028.30	Legal services
	24/10/2025	11,990.88	Legal services
	02/10/2025	2,297.57	Legal services
	02/10/2025	5,175.17	Legal services
	16/09/2025	5,494.50	Legal services
	03/09/2025	15,549.49	Legal services
	03/09/2025	2,190.87	Legal services
	19/08/2025	9,141.66	Legal services
	19/08/2025	14,850.00	Legal services
	21/07/2025	865.76	Legal services
	04/07/2025	5,544.00	Legal services
	04/07/2025	30,250.00	Legal services
Total		**$312,570.11**	

Long-form expenditure summary for the 2025-26 financial year

Payments to related parties

Recipient	Date of payment	Amount ($)	Nature of transaction
Resolution Capital			
	23/07/2025	333,532.02	Investment Management services
	24/10/2025	337,794.40	Investment Management services
	22/01/2026	345,576.12	Investment Management services
	1/05/2026	312,009.41	Investment Management services
Total		**$1,328,911.95**	

Recipient	Date of payment	Amount ($)	Nature of transaction
QIC			
	23/07/2025	10,969.89	Investment Management services
	24/10/2025	11,090.51	Investment Management services
	22/01/2026	11,090.51	
	8/05/2026	10,849.41	
Total		**$44,000.32**	

GRAND TOTAL – all related party payments	**$162,530,876.07**	
Rounded	**$162.5 million**	

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