

Long-form expenditure summary for the 2024-25 financial year

Short-form summary of expenditure for the Fund for the 2024-25 financial year

The detailed list below shows cash payments made during the 2024-25 financial year.

Total expenditure for the financial year 2024-25*	Amount (\$)
Aggregate remuneration expenditure	\$5.6 million
Aggregate promotion, marketing, or sponsorship expenditure	\$2.45 million
Aggregate political donations	NIL
Aggregate industrial body payments	NIL
Aggregate related party payments	\$147.4 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 2025, including Catholic Super. The amounts presented are inclusive of GST where applicable.

Notes to the short-form expenditure summary for the 2024-25 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 the Fund'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: the Fund does not make political donations.

Aggregate industrial body payments: the Fund 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 (**\$86.9m**), investment management services (**\$53.2m**), financial planning services (**\$4.5m**), 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
1000 Mile Travel Group	2,399.14	Fund promotion
Add Impact International Pty Ltd	73,000.00	Market research
Australia Post	46,438.29	Member communications
Australian Catholic Bishops Conference	11,525.00	Fund promotion
Banner Lady (Danpen Pty Ltd)	7,105.00	Fund promotion
Blueprintx	20,324.27	Member communications
Carissa Clee	4,620.00	Member communications
Carta Strategy	24,600.00	Market research
CATHOLIC DIOCESE OF MAITLAND-NEWCASTLE	2,500.00	Fund promotion
Catholic Diocese of Toowoomba	474.29	Fund promotion
Chandler CK Communications Group Pty Ltd	78,510.22	Member communications
Clifton Operations Pty Ltd	11,344.00	Staff development
Cummins&Partners Pty Ltd	895,398.13	Fund promotion
Customer Service Benchmarking Australia	146,250.00	Market research
Eastern Press Pty Ltd	72,830.15	Member communications
Getty Images Sales Australia Pty Ltd	10,350.00	Fund promotion
Gladstone Regional Council	3,067.27	Fund promotion
Google Australia Pty Limited	29,225.74	Fund promotion
Hearts and Science Pty Ltd	125,960.57	Fund promotion
Icon Agency	56,250.00	Fund promotion
Iconinc Holdings Pty Ltd	73,700.00	Fund promotion
ID Supplies Pty Ltd	394.00	Fund promotion
IVE Group Victoria Pty Limited	84,537.35	Member communications
KANTINA KARTEL	984.01	Staff development
Luma Research	23,200.00	Market research
Mayflower Consulting Pty Ltd	80,182.83	Product disclosure
Meltwater Australia Pty Ltd	5,645.00	Market research
Mercer Consulting (Australia) Pty Ltd	30,000.00	Consultancy fees
MERCER OUTSOURCING (AUSTRALIA) PTY LTD	20,100.00	Member communications
Milo's in Good Company	81,720.00	Fund promotion
Money 101 - Money for Lift Pty Ltd	34,144.80	Member communications
Monster & Bear Pty Ltd	700	Member communications
PricewaterhouseCoopers	60,000.00	Consultancy fees
QUALTRICS LLC	91,760.00	Market research
Rainmaker Information Pty Ltd	37,000.00	Fund promotion
Spark Green Holdings Pty	24,480.00	Member communications
SuperRatings Pty Ltd	54,102.99	Market research
Towers Watson Australia Pty Ltd	22,870.00	Consultancy fees
Tracey Skinner	8,934.89	Member communications
VIDPOD	12,000.00	Member communications
Zenith CW Pty Ltd	82,075.58	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			
	02/07/2024	8,689,624.00	Trustee services
	23/07/2024	3,685,520.00	Trustee services
	16/08/2024	8,689,624.00	Trustee services
	20/09/2024	8,689,624.00	Trustee services
	29/10/2024	8,689,624.00	Trustee services
	03/12/2024	8,689,624.00	Trustee services
	09/01/2025	8,689,624.00	Trustee services
	19/02/2025	8,689,624.00	Trustee services
	31/03/2025	8,689,624.00	Trustee services
	12/05/2025	8,689,624.00	Trustee services
	19/06/2025	1,800,000.00	Trustee services
	26/06/2025	2,400,000.00	Trustee services
	30/06/2025	800,000.00	Trustee services
Total		\$86,892,136.00	

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Payments to related parties

Recipient	Date of payment	Amount (\$)	Nature of transaction
Togethr Asset Management Pty Ltd			
	11/07/2024	565,437.96	Investment Management services
	01/08/2024	6,613,050.06	Investment Management services
	29/08/2024	3,208,391.40	Investment Management services
	09/09/2024	1,448,580.02	Investment Management services
	13/09/2024	711,070.25	Investment Management services
	22/11/2024	9,816,135.03	Investment Management services
	30/11/2024	3,034,569.30	Investment Management services
	18/12/2024	401,491.19	Investment Management services
	13/02/2025	2,018,908.30	Investment Management services
	21/02/2025	11,576,047.69	Investment Management services
	23/06/2025	13,806,918.05	Investment Management services
Total		\$53,200,599.25	

Recipient	Date of payment	Amount (\$)	Nature of transaction
Togethr Financial Planning Pty Ltd			
	15/07/2024	339,166.67	Financial Planning services
	16/08/2024	339,166.67	Financial Planning services
	30/08/2024	158,085.00	Financial Planning services
	13/09/2024	339,166.67	Financial Planning services
	29/10/2024	339,166.67	Financial Planning services
	26/11/2024	339,166.67	Financial Planning services
	03/12/2024	339,166.67	Financial Planning services
	09/01/2025	339,166.67	Financial Planning services
	19/02/2025	339,166.67	Financial Planning services
	28/02/2025	339,166.67	Financial Planning services
	28/03/2025	339,166.67	Financial Planning services
	28/04/2025	339,166.67	Financial Planning services
	29/05/2025	220,000.00	Financial Planning services
	30/06/2025	412,500.00	Financial Planning services
Total		\$4,521,418.37	

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Recipient	Date of payment	Amount (\$)	Nature of transaction
Australian Council of Superannuation Investors (ACSI)			
	20/06/2025	12,650.00	Education service
	04/06/2025	371,294.00	Membership fees
	12/12/2024	86,464.40	Voting service
Total		\$470,408.40	

Recipient	Date of payment	Amount (\$)	Nature of transaction
Allens			
	18/06/2025	55,766.22	Legal services
	09/05/2025	59,840.74	Legal services
	07/05/2025	3,892.68	Legal services
	14/04/2025	1,810.22	Legal services
	14/04/2025	38,915.45	Legal services
	26/03/2025	16,884.95	Legal services
	20/02/2025	22,479.93	Legal services
	23/01/2025	8,699.13	Legal services
	23/01/2025	3,452.63	Legal services
	08/01/2025	3,448.17	Legal services
	08/01/2025	935.55	Legal services
	07/01/2025	264,881.51	Legal services
	07/01/2025	59,026.77	Legal services
	17/12/2024	34,259.94	Legal services
	12/12/2024	10,614.78	Legal services
	25/11/2024	3,389.10	Legal services
	18/11/2024	10,362.33	Legal services
	21/10/2024	18,230.85	Legal services
	01/10/2024	1,612.05	Legal services
	18/09/2024	28,851.35	Legal services
	28/08/2024	20,495.75	Legal services
Total		\$667,850.10	

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Payments to related parties

Recipient	Date of payment	Amount (\$)	Nature of transaction
Resolution Capital			
	1/08/2024	299,157.17	Investment Management services
	11/10/2024	320,374.40	Investment Management services
	23/01/2025	335,384.30	Investment Management services
	16/04/2025	330,348.26	Investment Management services
Total		\$1,285,264.13	

Recipient	Date of payment	Amount (\$)	Nature of transaction
QIC			
	30/07/2024	198,718.20	Investment Management services
	6/05/2025	193,780.82	Investment Management services
Total		\$392,499.02	

GRAND TOTAL – all related party payments	\$147,430,175.27
Rounded	\$147.5 million