

The Fragile X Association of Australia Endowment Fund



Message from David Bassingthwaighte Chair, Fragile X Association of Australia Endowment Fund

The Fragile X Association of Australia has been helping those affected by Fragile X syndrome for 23 years. It does this through clinics and seminars to improve the health and well being of people affected by the syndrome and to raise awareness of the condition. These services are provided free of charge to anyone who needs them and the Association receives no government funding.

I have no personal family connection with Fragile X syndrome but I have been involved with the Association since 2004, as I believed it was a very important charity bringing awareness of this inherited intellectual disability to the public. In this time, I have seen it grow from a small group of committed parents and carers to the well administered national organisation it is today.

The Fragile X Association of Australia Endowment Fund was established in early 2012 to enable funds to be invested to generate funds for the activities of the Association to ensure its long term survival and operation.

The overall objective of the Endowment Fund's investment strategy is to provide a conservative and prudent framework within which the fund may grow its capital and earn a steady income to support the Association's core activities of raising awareness of the syndrome and supporting those families living with Fragile X.

The Endowment Fund is maintained and accounted for separately from the Association's other funds and is managed by an Advisory Board. This Board meets at least four times a year and reports half yearly to the Association.

I was delighted to accept the invitation to chair the Endowment Fund Board and am extremely lucky to have the expertise of the other Board members to assist me, all of whom are profiled in this brochure. I am confident that moneys given to the Association and administered by the Endowment Fund Board will be invested conservatively and wisely.

Gifts to the Fund over \$2 are tax deductible. Where donors designate that their contribution is to the Fund, donations of cash will be paid directly into the Fund's bank account and donations of other property will be recorded in the accounts of the Fund. All legacies or bequests from Wills received will be paid into the Fund, unless the terms of the gift otherwise specify.

I commend you to give generously to this new initiative, which aims to secure the Association's long term future. As we are nearing the end of the Financial Year please let us have your donations by 30 June 2012.

Regards,

A handwritten signature in black ink that reads 'David Bassingthwaighte'.

David Bassingthwaighte 1 June 2012



The Fragile X Association of Australia

Endowment Fund Board

David Bassingthwaighe (Chair) retired as a director of Pricewaterhouse Coopers in July 2011 where he was an advisor to high net worth individuals, their private companies and trusts. He specialises in income tax, superannuation, estate and succession planning, as well as providing sophisticated advice on structures to protect and effectively pass wealth between generations. Since retirement, David has set up a consulting business with a number of family investment companies owned by wealthy individuals.

Martin Davey is a chartered accountant who specialises in Audit and Corporate Finance. In 1994 he joined Schrodgers Australia as Finance Director, responsible for the property funds management business. In 2000 Martin joined the Sydney Futures Exchange (SFE) as Chief Financial Officer. He retired in 2006, after overseeing the merger of the SFE business into the Australian Securities Exchange (ASX).

Bill Evans currently Chief Economist Managing Director & Global Head of Economics & Research Westpac Banking Corporation has worked as a Research Manager for the Reserve Bank of Australia, Treasurer at the Commonwealth Bank of Australia, and prior to joining Westpac in 1991, was Director and Head of Financial Markets at Schrodgers Australia Limited for 8 years. He is Westpac's economic spokesman and is responsible for all of the Bank's economic research.

John Kelleher began his career in the UK before immigrating to Australia in 1977 where he commenced work with Jones Lang Wootton (now Jones Lang Lasalle). He then joined Schrodgers Australia where he became Joint Managing Director of Schrodgers Australia Property Management Ltd, which was responsible for managing the Schrodgers Property Fund, a major listed property trust and property portfolio manager for private clients and major superannuation funds.

John O'Connor, B.Ec., MAICD, has spent several decades in the financial markets. During this period he has worked in London, the US and in Australia. His recent experience has been in capital raisings both internationally and in Australia.

Marianne Pascoe (BA, LLB (Hons) ANU, LLM (Hons) Syd) is a barrister employed by the NSW government. She has been Deputy Parliamentary Counsel since 1994 and has over 25 years experience in drafting legislation and giving specialised legal advice with respect to proposed legislation.

To make a donation or bequest to the Endowment Fund



Donation and/or bequest form

To make a donation to Fragile X Association of Australia Inc Endowment Fund please complete the form below.

Alternatively, you have the power to help us continue to support people living with Fragile X. After family and friends, please consider the Fragile X Association of Australia as a beneficiary under your will. If you are considering including the Association in your will please complete the form below for further information.

The Association thanks all past and future contributors for their support and generosity.

Donation to the Fragile X Association of Australia Endowment Fund

Name: _____ Email: _____

Address: _____

Suburb: _____ State: _____ Post Code: _____

I enclose a cheque/money order to the total of \$ _____ as a donation.

(Please make cheque payable to the Fragile X Association of Australia Endowment Fund. Donations over \$2 are tax deductible. A receipt will be forwarded.)

OR please debit my Mastercard/Visa to the amount of \$ _____

(please circle)

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Name on card: _____ Expiry Date: _____

Signature _____

OR/AND Please send me information on how I can leave a bequest to the Fragile X Association of Australia Endowment Fund.

(please tick the box)

**Please return this form to the Fragile X Association of Australia
PO Box 109, Manly NSW 1655 or fax to 02 9976 2396.**

