

# AMM 2023-24

## Extra expenditure information

The information set out below is provided in accordance with the Superannuation Industry (Supervision) Act 1993 section 29P and Superannuation Industry (Supervision) Regulations 1994 regulation 2.10.

### Promotion, marketing or sponsorship expenditure

Greater size and scale mean we can continue to deliver the award-winning value you've come to know—it improves access to high-quality investment options and keeps downward pressure on fees for our members. To achieve scale, we engage in promotion, marketing and sponsorships, strictly in members' best financial interests.

The promotion, marketing, or sponsorship expenditure listed below includes promotional and educational materials, media, advertising and partnership arrangements and their design, production and distribution.

In line with our proud history with the higher education and research sectors, many of UniSuper's partnerships involve university partners, among other sponsorship arrangements. In addition, following UniSuper's successful merger with Australian Catholic Super in December 2022, partnerships with employers in the Catholic education sector are also a focus.

Listed also, are memberships to superannuation industry advocacy bodies and partnership arrangements with strategic peak bodies and organisations. These bodies assist in providing vital policy development across the industry that affects all our members, such as the superannuation guarantee rate, payment regimes and more.

This expenditure aligns with our brand awareness and new member goals, to grow the fund, helping to maintain competitive fees and build our members' retirement savings. We only ever engage in promotion in our members' best financial interests, so we can continue to provide our members with the award-winning fund they expect and deserve.

VENDOR	CONTRACT TERM	NATURE OF EXPENDITURE	CONTRACT VALUE (\$)
Amplifi Australia Pty Ltd	6 months	Advertising - H1 FY24	4,804,240
Amplifi Australia Pty Ltd	6 months	Advertising - H2 FY24	5,415,062
Amplifi Australia Pty Ltd	6 months	Advertising - H2 FY23	3,468,400
Amplifi Australia Pty Ltd	6 months	Advertising	726,550
Amplifi Australia Pty Ltd	12 months	Award sponsorship	127,400
Dexus CPA Pty Ltd	8 years and 10 months	Rooftop signage - commenced from FY19	1,307,840
Super Members Council of Australia Limited	12 months	Membership fee FY25	639,232
Super Members Council of Australia Limited	9 months	Membership fee FY24	484,000
Australian Council of Superannuation Investors Ltd	12 months	Membership fee FY25	508,464
Australian Council of Superannuation Investors Ltd	12 months	Voting subscription	92,291

VENDOR	CONTRACT TERM	NATURE OF EXPENDITURE	CONTRACT VALUE (\$)
Porter Novelli Australia Pty Ltd	12 months	Public relations	395,573
Hive Creative Pty Ltd	Per engagement <sup>2</sup>	Marketing	331,743
Hive Empire Pty Ltd	1 month	Advertising - June 2023	34,560
Hive Empire Pty Ltd	1 month	Advertising - July 2023	26,775
Hive Empire Pty Ltd	1 month	Advertising - August 2023	29,985
Hive Empire Pty Ltd	1 month	Advertising - September 2023	18,795
Hive Empire Pty Ltd	1 month	Advertising - October 2023	16,110
Hive Empire Pty Ltd	1 month	Advertising - November 2023	10,845
Hive Empire Pty Ltd	1 month	Advertising - December 2023	8,760
Hive Empire Pty Ltd	1 month	Advertising - January 2024	16,335
Hive Empire Pty Ltd	1 month	Advertising - February 2024	28,590
Hive Empire Pty Ltd	1 month	Advertising - March 2024	25,800
Hive Empire Pty Ltd	1 month	Advertising - April 2024	18,780
Hive Empire Pty Ltd	1 month	Advertising - May 2024	16,980
Reputation Institute Pty Ltd	13 months	Corporate reputation tracking	197,000
Noisy Beast Pty Ltd	12 months	Marketing consulting	187,500
Besixth Pty Ltd	One-off	Brand activation on campus	182,126
The Trustee for Wilkinson Family Trust	9 months	Branding	135,500
The Association of Superannuation Funds of Australia Limited	12 months	Membership FY25	131,590
The Association of Superannuation Funds of Australia Limited	12 months	ASP membership FY25	100,000
The Association of Superannuation Funds of Australia Limited	12 months	ASP membership FY24	95,000
The Association of Superannuation Funds of Australia Limited	12 months	CPD subscription	31,191
Ive Group Australia Pty Ltd	One-off	Fund promotional material	95,466
Striver Pty Ltd	12 months	Brand sponsorship	90,000
Striver Pty Ltd	One-off	Brand sponsorship	63,000
Year13 Pty Ltd	12 months	Branding	70,000
Rainmaker Information Pty Limited	12 months	Fund promotional and educational material	56,500
Strem Pty Ltd	13 months	Media monitoring	52,878
Ive Group Victoria Pty Ltd	One-off	Fund promotional material	39,476
Ive Group Victoria Pty Ltd	One-off	Public relations	2,000
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - July23	13,507
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - August23	17,472

VENDOR	CONTRACT TERM	NATURE OF EXPENDITURE	CONTRACT VALUE (\$)
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - September23	51,720
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - October23	17,195
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - November23	24,387
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - December23	24,070
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - January24	2,770
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - February24	4,842
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - March24	22,624
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - April24	18,465
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - May24	1,724
Ive Group Victoria Pty Ltd	1 month	Fund promotional material - June24	11,580
National Catholic Education Commission	One-off	Event sponsorship	50,000
Hemmes Trading Pty Limited	One-off	Brand event	40,055
Big Datr Pty Ltd	12 months	Advertising	38,000
Financial Advice Association Australia	One-off	Brand sponsorships	30,000
Australian Higher Education Industrial Association	12 months	Annual partnering sponsorship	30,000
Zinc at Federation Square	One-off	Brand event	26,320
Catholic Archdiocese of Sydney	One-off	Event sponsorship	25,000
Data Distribution and Marketing Pty Ltd	1 month	Advertising - June 2023	15,000
Data Distribution and Marketing Pty Ltd	1 month	Advertising - July 2023	17,724
Data Distribution and Marketing Pty Ltd	1 month	Advertising - August 2023	15,600
Data Distribution and Marketing Pty Ltd	1 month	Advertising - September 2023	14,112
Data Distribution and Marketing Pty Ltd	1 month	Advertising - October 2023	10,464
Data Distribution and Marketing Pty Ltd	1 month	Advertising - November 2023	12,096
Data Distribution and Marketing Pty Ltd	1 month	Advertising - December 2023	6,312
Data Distribution and Marketing Pty Ltd	1 month	Advertising - January 2024	9,012
Data Distribution and Marketing Pty Ltd	1 month	Advertising - February 2024	10,092
Data Distribution and Marketing Pty Ltd	1 month	Advertising - March 2024	14,085
Data Distribution and Marketing Pty Ltd	1 month	Advertising - April 2024	15,000
Data Distribution and Marketing Pty Ltd	1 month	Advertising - May 2024	21,930
Committee for Economic Development of Australia	12 months	Fund advocacy	21,800
Morningstar Australasia Pty Limited	12 months	Trade media partnership	20,000
The University of Queensland	12 months	University sponsorship	19,273

VENDOR	CONTRACT TERM	NATURE OF EXPENDITURE	CONTRACT VALUE (\$)
Momentum Media (Wealth) Pty Ltd	One-off	Trade media partnership	18,500
Sprout Social	One-off	Social media monitoring	16,943
Money For Life Pty Ltd	12 months	Fund promotional and educational material	15,500
Queensland Catholic Education Commission	12 months	Event sponsorship	15,000
Business News Pty Ltd	One-off	Sponsorship	15,000
Universities Australia	12 months	Annual partnering sponsorship	14,950
ICMI	One-off	Branding	14,800
Macquarie University	5 years	University sponsorship - commenced from FY24	10,000
Macquarie University	12 months	University sponsorship	3,182
Encore Event Technologies Pty Limited	One-off	Branding	10,953
Queensland University of Technology	12 months	University sponsorship	10,700
Sydney Catholic Schools Ltd	12 months	Annual partnering sponsorship	10,000
Association of Catholic School Principals In NSW	12 months	Annual partnering sponsorship	10,000
University of Canberra	12 months	University sponsorship	10,000
National Tertiary Education Industry Union	One-off	Event sponsorship	10,000
University of Melbourne	12 months	University sponsorship	9,000
Monash University	12 months	University sponsorship	8,909
Ratecity Pty Ltd	14 months	Advertising	8,700
Champions of Change Coalition	1 month	Public relations	8,333
Queensland Catholic Primary Principals Association	12 months	Annual partnering sponsorship	8,000
Griffith University	12 months	University sponsorship	7,600
Western Sydney University	12 months	University sponsorship	7,318
Edith Cowan University	12 months	University sponsorship	7,227
Catholic Secondary Deputy Principals' Association	12 months	Annual partnering sponsorship	7,000
The Trustee For J&M Print Services Unit Trust	One-off	Advertising	6,280
The University of Newcastle	3 years	University sponsorship - commenced from FY24	6,000
The University of Newcastle	12 months	University sponsorship	4,000
Central Queensland University	12 months	University sponsorship	5,500
University of Southern Queensland	12 months	University sponsorship	5,500
The Roman Catholic Trust Corporation For The Diocese Of Rockhampton	One-off	Event sponsorship	5,500
Diocese of Toowoomba Catholic Schools	12 months	Event sponsorship	5,455
Armidale Catholic Schools	One-off	Event sponsorship	5,455
Catholic Education Services Cairns	One-off	Event sponsorship	5,182
Australian Catholic Bishops Conference	One-off	Event sponsorship	5,000

VENDOR	CONTRACT TERM	NATURE OF EXPENDITURE	CONTRACT VALUE (\$)
Australian Catholic Bishops Conference	One-off	Event sponsorship	2,850
The University of Wollongong	12 months	University sponsorship	5,000
Australasian Tax Teachers Association	One-off	Event sponsorship	5,000
The University of Melbourne Medical Students' Society Inc.	One-off	Event sponsorship	5,000
Catholic Schools NSW Limited	One-off	Event sponsorship	5,000
The Australian National University	12 months	University sponsorship	4,945
Flinders University	12 months	University sponsorship	4,909
Catholic School Parents Australia	One-off	Event sponsorship	4,545
La Trobe University	12 months	University sponsorship	3,700
Eecw Pty Ltd	One-off	Event sponsorship	3,636
Charles Darwin University	12 months	University sponsorship	3,450
Deakin University	12 months	University sponsorship	3,250
Conference Design Pty Ltd	One-off	Event sponsorship	3,182
University of the Sunshine Coast	12 months	University sponsorship	3,100
The University of Adelaide	12 months	University sponsorship	3,000
The University of Adelaide	3 Years	University sponsorship - commenced from FY23	1,800
The University of Sydney	12 months	University sponsorship	3,000
Harry Perkins Institute of Medical Research	12 months	University sponsorship	3,000
Australian Teacher Education Association	One-off	Event sponsorship	3,000
Catholic Primary Principals Association of Western Australia Inc	One-off	Sponsorship	3,000
Australian Business Deans Council	One-off	Event sponsorship	3,000
Sbx Pty Ltd	One-off	Public relations	2,565
James Cook University	12 months	University sponsorship	2,500
Charles Sturt University	One-off	Advertising	2,500
Telethon Kids Institute	One-off	Sponsorship	2,500
Curtin University	12 months	Event sponsorship	2,300
Creative Visuals Pty Ltd	3 months	Advertising	2,055
Swinburne University of Technology	12 months	University sponsorship	2,000
Catholic Education Western Australia Limited	One-off	Event sponsorship	2,000
Aiesec Australia Ltd	One-off	Branding	2,000
Une Foundation	One-off	Award sponsorship	2,000
University of South Australia	12 months	University sponsorship	1,955
University of Tasmania	12 months	University sponsorship	1,875
Sobah Beverages Pty Ltd	One-off	Event sponsorship	1,691
The University of Notre Dame Australia	12 months	University sponsorship	1,500

VENDOR	CONTRACT TERM	NATURE OF EXPENDITURE	CONTRACT VALUE (\$)
The Florey Institute of Neuroscience and Mental Health	One-off	Award sponsorship	1,500
Adelaide University Union	12 months	University society sponsorship	1,400
Eve Flight	One-off	Branding	1,280
Economics Student Society of Australia	12 months	University sponsorship	1,000
RMIT University	12 months	University sponsorship	1,000
The Australian Council for Educational Research Limited	One-off	Award sponsorship	1,000
Australian Business Students Association	One-off	University society sponsorship	1,000
Bond University Ltd	One-off	University sponsorship	925
UOW Pulse Ltd	One-off	Event sponsorship	909
UOW Pulse Ltd	One-off	Public relations	168
Deakin University Student Association Inc	12 months	University society sponsorship	900
St Pauls Publications	One-off	Event sponsorship	800
Southern Cross University	12 months	University sponsorship	750
Mater Dei College	One-off	Sponsorship	750
Gourmet Basket	One-off	Public relations	750
St Vincent's Institute of Medical Research	One-off	Award sponsorship	500
QUT Women in Business	One-off	University society sponsorship	500
Coliemore Catering	One-off	Public relations	435
The Trustee for Richards Family Trust	One-off	Event sponsorship	251
The Sweet and Savoury Chef Pty Ltd	One-off	Event sponsorship	250
USC Student Guild	One-off	Public relations	10
<b>Total<sup>1</sup></b>			<b>21,188,941</b>

<sup>1</sup> The sum of contract value is the total expenditure made, or to be made, under the contract. The sum of contract value doesn't necessarily reflect amounts paid in the current financial year. This means the figures expressed here will not equal the summary notice as that reflects the FY24 spend.

<sup>2</sup> Hive Creative do not have a set timescale on their contracts and are charged depending on activity requirements. These are based on the delivery of required outputs rather than on a set timescale.

## Industrial body payments

The payments listed below are to industrial bodies registered under the Fair Work (Registered Organisations) Act 2009. Payments to these entities cover some sponsorships and some director fees.

INDUSTRIAL BODY	PERIOD	NATURE OF EXPENDITURE	FY24 (\$)
National Tertiary Education Industry Union	July 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Industry Union	August 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Industry Union	September 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Industry Union	October 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Industry Union	November 2023	Directors' fees - Sarah Roberts and Michael McNally	17,472
National Tertiary Education Industry Union	December 2023	Directors' fees - Sarah Roberts and Michael McNally	16,304

INDUSTRIAL BODY	PERIOD	NATURE OF EXPENDITURE	FY24 (\$)
National Tertiary Education Industry Union	January 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Industry Union	February 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Industry Union	March 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Industry Union	April 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Industry Union	May 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Industry Union	June 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
Australian Higher Education Industrial Association	August 2023	2023 Conference sponsorship	15,000
Australian Higher Education Industrial Association	June 2024	2024 Conference sponsorship	15,000
National Tertiary Education Industry Union	October 2023	Women's breakfast sponsorship	10,000
<b>Total</b>			<b>205,124</b>

## Related party payments

The payments listed below are to entities connected in certain ways to the fund for business operations, goods or services. Payments to these entities largely cover administration, investment, financial advice, trustee and director fees—these are essential to the fund's core operations. Many of our services are delivered in-house, and so fees are paid to UniSuper Management Pty Ltd for administration, investment management and financial advice purposes.

RELATED PARTY	PERIOD	NATURE OF EXPENDITURE	FY24 (\$)
UniSuper Management Pty Ltd	July 2023	Administration fees	7,177,801
UniSuper Management Pty Ltd	August 2023	Administration fees	6,391,418
UniSuper Management Pty Ltd	September 2023	Administration fees	6,751,212
UniSuper Management Pty Ltd	October 2023	Administration fees	7,002,659
UniSuper Management Pty Ltd	November 2023	Administration fees	6,960,405
UniSuper Management Pty Ltd	December 2023	Administration fees	6,754,819
UniSuper Management Pty Ltd	January 2024	Administration fees	6,931,357
UniSuper Management Pty Ltd	February 2024	Administration fees	6,843,202
UniSuper Management Pty Ltd	March 2024	Administration fees	6,977,380
UniSuper Management Pty Ltd	April 2024	Administration fees	6,940,357
UniSuper Management Pty Ltd	May 2024	Administration fees	7,061,418
UniSuper Management Pty Ltd	June 2024	Administration fees	6,644,944
UniSuper Management Pty Ltd	July 2023	Investment fees	26,993,897
UniSuper Management Pty Ltd	August 2023	Investment fees	20,918,124
UniSuper Management Pty Ltd	September 2023	Investment fees	19,897,803
UniSuper Management Pty Ltd	October 2023	Investment fees	20,406,534
UniSuper Management Pty Ltd	November 2023	Investment fees	19,717,491

RELATED PARTY	PERIOD	NATURE OF EXPENDITURE	FY24 (\$)
UniSuper Management Pty Ltd	December 2023	Investment fees	20,875,104
UniSuper Management Pty Ltd	January 2024	Investment fees	28,278,735
UniSuper Management Pty Ltd	February 2024	Investment fees	26,833,146
UniSuper Management Pty Ltd	March 2024	Investment fees	29,360,386
UniSuper Management Pty Ltd	April 2024	Investment fees	27,909,217
UniSuper Management Pty Ltd	May 2024	Investment fees	15,907,285
UniSuper Management Pty Ltd	June 2024	Investment fees	21,360,337
UniSuper Management Pty Ltd	November 2023	Insurance design project	4,303,962
UniSuper Management Pty Ltd	December 2023	Insurance design project	890,432
UniSuper Management Pty Ltd	January 2024	Insurance design project	983,895
UniSuper Management Pty Ltd	February 2024	Insurance design project	1,216,840
UniSuper Management Pty Ltd	March 2024	Insurance design project	1,114,553
UniSuper Management Pty Ltd	April 2024	Insurance design project	1,503,106
UniSuper Management Pty Ltd	May 2024	Insurance design project	1,251,235
UniSuper Management Pty Ltd	June 2024	Insurance design project	907,765
UniSuper Management Pty Ltd	July 2023	Financial advice fees	601,423
UniSuper Management Pty Ltd	August 2023	Financial advice fees	832,789
UniSuper Management Pty Ltd	September 2023	Financial advice fees	674,514
UniSuper Management Pty Ltd	October 2023	Financial advice fees	824,500
UniSuper Management Pty Ltd	November 2023	Financial advice fees	941,642
UniSuper Management Pty Ltd	December 2023	Financial advice fees	728,686
UniSuper Management Pty Ltd	January 2024	Financial advice fees	574,518
UniSuper Management Pty Ltd	February 2024	Financial advice fees	773,037
UniSuper Management Pty Ltd	March 2024	Financial advice fees	1,101,132
UniSuper Management Pty Ltd	April 2024	Financial advice fees	812,456
UniSuper Management Pty Ltd	May 2024	Financial advice fees	761,910
UniSuper Management Pty Ltd	June 2024	Financial advice fees	1,005,632
National Tertiary Education Union	July 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Union	August 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Union	September 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Union	October 2023	Director's fees - Sarah Roberts	8,381
National Tertiary Education Union	November 2023	Directors' fees - Sarah Roberts and Michael McNally	17,475
National Tertiary Education Union	December 2023	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Union	January 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304



RELATED PARTY	PERIOD	NATURE OF EXPENDITURE	FY24 (\$)
National Tertiary Education Union	February 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Union	March 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Union	April 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Union	May 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
National Tertiary Education Union	June 2024	Directors' fees - Sarah Roberts and Michael McNally	16,304
Allens	August 2023	Legal fees - where Peter Warne is a Director	6,019
Allens	March 2024	Legal fees - where Peter Warne is a Director	6,823
Allens	April 2024	Legal fees - where Peter Warne is a Director	3,747
Allens	April 2024	Legal fees - where Peter Warne is a Director	73,582
Allens	June 2024	Legal fees - where Peter Warne is a Director	23,500
Allens	June 2024	Legal fees - where Peter Warne is a Director	8,800
Australian Catholic University	November 2023	Director's fees - Stephen Weller	7,523
Australian Catholic University	December 2023	Director's fees - Stephen Weller	7,608
Australian Catholic University	January 2024	Director's fees - Stephen Weller	7,608
Australian Catholic University	February 2024	Director's fees - Stephen Weller	7,608
Australian Catholic University	March 2024	Director's fees - Stephen Weller	7,608
Australian Catholic University	April 2024	Director's fees - Stephen Weller	7,094
Macquarie University	April 2024	Director's fees - Nicole Gower	9,898
Macquarie University	May 2024	Director's fees - Nicole Gower	9,898
Macquarie University	June 2024	Director's fees - Nicole Gower	9,898
Super Members Council of Australia	February 2024	Director training	7,532
<b>Total</b>			<b>383,068,931</b>

This information is current as at November 2024 and is based on our understanding of legislation at that date. Information is subject to change. Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850

Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806

Date: November 2024 US24-0260 1124