



16 September 2024

Julia Angrisano
National Secretary
Finance Sector Union of Australia
Sent via email: julia.angrisano@fsunion.org.au

Dear Julia Angrisano

Notification of changes – Action required

We acknowledge receipt of a Notification of Change to the office holders of the Finance Sector Union of Australia (AR2024/9).

A list of those changes has been summarised in Appendix A at the end of this letter.

What you need to do right now

- Any person who has been elected or appointed to a new office that has financial management duties (which usually includes all the committee of management) **MUST** do [financial training](#) or [obtain an exemption](#)
- Inform all officers of their [disclosure obligations](#)
- Consider giving your new officers the link to the Commission's [Officer Induction Kit](#)

These next steps are explained below in more detail.

Financial training must be done within 6 months

Any officer who has been elected or appointed to a new office that has financial management duties must complete [financial training](#) (or obtain an exemption) **within 6 months** after taking office (section 293K of the *Fair Work (Registered Organisations) Act 2009* (RO Act)).

The organisation is responsible for this requirement. You should arrange for the relevant officers to have training as soon as possible.

Good governance processes around financial training are highly recommended. These include:

- keeping a list of all offices that have financial management duties

- having a single person or officer responsible for overseeing the process
- collecting records of who has done training or obtained an exemption, including any certificates and exemption letters
- doing refresher courses for officers who have been re-elected to the same office (and are not required to do training under the RO Act)
- extending training to non-officers who are essential to your financial processes



Officer financial training audit

An audit by the Commission into officer training found that organisations frequently misunderstood **which** officers are required to do training.

To help with this we have an [officer training online panel](#) with examples explaining what triggers the need to do training and how to identify the offices that require it.

Further information about training is provided in our [officer financial training fact sheet](#).

Help for new officers: Officer Induction Kit

The Commission has created an [Officer Induction Kit](#) to assist new officers. The Kit has resources that will help an officer to understand their general duties as an officer and their specific duties as an officer in your organisation. It also includes tools to guide an officer's understanding of compliance dates, disclosures and other reporting obligations.

Please direct your officers to the kit which is on the Commission's [officers and disclosures](#) page.

Disclosure obligations: what officers must do

All officers are required to make disclosures regarding remuneration, non-cash benefits and material personal interests. Details are contained in the RO Act and are summarised in the Commission's [Disclosures Fact Sheet](#).

The organisation and officers are both responsible for meeting this obligation.

Time frames for notifications of change

Notifications of change must be lodged within 35 days of the change occurring (regulation 151 *Fair Work (Registered Organisations) Regulations 2009*).

Resources to help you make your notifications of change

Notifications of change are vitally important to maintain the transparency of an organisation to its members. They empower members to hold the organisation properly to account for its decisions.

To ensure that organisations get these notifications right we have created resources to help you understand the notification of change requirement and complete it quickly.

These resources include:

- [notification of change template](#)
- a podcast that answers the question – [who is an officer?](#)
- and a [fact sheet on notifications of change](#) that explains the requirement



eLearning module – notifications of change

The Commission has launched an eLearning module to assist organisations in understanding when a notification of change is required.

The [eLearning module](#) is available on our website.

It will take approximately 20 minutes and has a short quiz at the end to help you test your knowledge.

Please contact 1300 341 665 or regorgs@fwc.gov.au if you have any questions or would like to discuss this matter further.

Yours sincerely

Fair Work Commission

Appendix A

The table below outlines the changes notified and when they were lodged.

Our records have been updated.

The notification of change and this filing letter can be viewed on the Commission Website through the [list of Registered Organisations](#).

Date of lodgement	Branch	Change	Within prescribed period (Yes/No). If No, how many days late
9 September 2024	n/a	Congress Delegate, Occupational Electorate - Superannuation (2)	Yes

9 September 2024

Registered Organisations
Governance and Advice Branch
Fair Work Commission
GPO Box 1994
Melbourne VIC 3001

By email: regorgs@fwc.gov.au

Dear Sir/Madam,

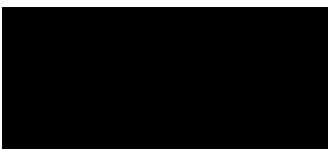
FINANCE SECTOR UNION OF AUSTRALIA

NOTIFICATION OF CHANGES TO RECORDS (Changes to Records in the Annual Return) required to be kept in accordance with section 230 *Fair Work (Registered Organisations) Act 2009* and regulation 147 *Fair Work (Registered Organisations) Regulations 2009*

I, Julia Angrisano, being the National Secretary of the Finance Sector Union, declare the following:

1. I am authorised to make this declaration.
2. The following is a correct statement of the changes made to the information contained in the records required to be kept by the organisation in accordance with s.230(1)(b), (c), and (d) of the *Fair Work (Registered Organisations) Act 2009*:
 - A list of changes to offices and the names, postal addresses and occupations of persons holding those offices is attached to this declaration at Annexure A and forms part of this declaration.

Signed:



Julia Angrisano
National Secretary

Dated: 9 September 2024

ANNEXURE A

THIS IS A PUBLIC DOCUMENT THAT WILL BE PUBLISHED ON THE WEBSITE

- Changes to Offices and Office Holders in the Organisation and its Branches:

Please note the 35 days begins at the earliest event (for instance when the officer retires) and an organisation may need to notify the events separately if the appointment or election process will take longer than 35 days.

Date of Change	Name of Office that has changed	Name of <u>Outgoing</u> Office Holder	Name of <u>New</u> Office Holder	Postal Address of <u>New</u> Office Holder	Occupation of <u>New</u> Office Holder
07/08/2024	Congress Delegate, Occupational Electorate – Superannuation	Jennifer Trevascus	Vacant	Vacant	Vacant
02/09/2024	Congress Delegate, Occupational Electorate – Superannuation	Helen Alesana	Vacant	Vacant	Vacant



26 February 2024

Julia Angrisano
National Secretary
Finance Sector Union of Australia
Sent via email: julia.angrisano@fsunion.org.au

Cc: melissa.brown@fsunion.org.au; wendy.streets@fsunion.org.au; jason.hall@fsunion.org.au; and nicole.mcpherson@fsunion.org.au

Dear Julia Angrisano

The Finance Sector Union of Australia's annual return of information (annual return) lodged under subsection 233(1) of the RO Act

Thank you for providing your annual return lodged under subsection 233(1) of the *Fair Work (Registered Organisations) Act 2009* (the RO Act).

Summary of your annual return and its assessment

Year	2024
Matter number	AR2024/9
Lodgement date	12 February 2024
Review	Primary Review
Result	FILED

Your primary review

Your annual return had a **primary review** which checked whether it was signed by an officer, lodged on time, the required declarations were made, included the list of offices and office holders and whether you met the requirements that the regulator raised with you last year. A primary review does not examine all the requirements of subsection 233(1).

Your annual return satisfied the requirements of the primary review and has been uploaded to the Fair Work Commission (the Commission) website.

The Commission's risk-based approach

This year your annual return was assessed against a primary review. Consistent with the Commission's risk-based approach, most annual returns are the subject of a primary review.

The remainder receive an advanced review which is a more comprehensive review.

Each organisation should expect that in some years their annual return will be the subject of an advanced review.

The Commission's [advanced review checklists](#) are published on our website.

Do you have any questions?

Information and education materials are available on our [website](#). These materials are regularly updated. We recommend you [subscribe to the Commission's subscription service to find out when we release new materials](#).

If you have any queries we can be contacted on 1300 341 665 or by email at regorgs@fwc.gov.au.

Yours sincerely

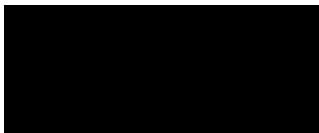
Fair Work Commission

ANNUAL RETURN OF INFORMATION (organisation with no branches) in accordance with Regulation 147 Fair Work (Registered Organisations) Regulations 2009 and sections 230 and 233 Fair Work (Registered Organisations) Act 2009

I, Julia Angrisano, being the National Secretary of the Finance Sector Union of Australia, declare the following:

1. I am authorised to make this declaration.
2. The register of members has, during the immediately preceding calendar year, been kept and maintained as required by section 230(1)(a) and section 230(2) of the *Fair Work (Registered Organisations) Act 2009* (the Act).
3. The following is a correct statement of the information contained in the records required to be kept by the organisation in accordance with section 230(1)(b), (c), and (d) of the Act:
 - The address of the organisation is Level 13, 380 La Trobe Street, Melbourne VIC 3000.¹
 - The organisation has no branches and no branches have ceased or commenced in the previous 12 months.²
 - On 31 December in the previous year the number of members was 21,764.³
 - A list of offices and the names, postal addresses and occupations of persons holding those offices as at the date of this declaration is attached at Annexure A and forms part of this declaration.
 - Under the rules of the organisation, no elections are scheduled in 2024.⁴
 - The organisation:
 - Has not entered into an agreement under section 151(1) of the Act with a state union.

Signed:



Julia Angrisano
National Secretary

Dated: 12 February 2024

[PLEASE NOTE: This declaration must be lodged with the Fair Work Commission by 31 March. It can be submitted to regorgs@fwc.gov.au. If at any time in the year this information changes a Notification of Changes must be lodged with the Commission within **35 days** of the change⁵.]

¹ Section 230(1)(d); reg. 147(d)

² Section 230(1)(d); reg. 147(a), (b), (c) & (d)

³ Section 230(1)(d); reg. 147(f)

⁴ Section 230(1)(d); reg. 147(e)

⁵ Section 233(2); reg. 151

Annexure A

THIS IS A PUBLIC DOCUMENT THAT WILL BE PUBLISHED ON THE WEBSITE

Offices and Office Holders in the Organisation:

Name of Office	Name of Office Holder	Postal Address of Office Holder	Occupation of Office Holder
National Secretary	Julia Angrisano	c/- GPO Box 9893, Melbourne VIC 3001	Paid Official
National President	Wendy Streets	As above	Paid Official
National Assistant Secretary	Jason Hall	As above	Paid Official
National Assistant Secretary	Nicole McPherson	As above	Paid Official
National Executive Member	Adam Fay	As above	Finance Worker
National Executive Member	Johanna Tran	As above	Finance Worker
National Executive Member	Karen Anthony	As above	Finance Worker
National Executive Member	Matthew Rowe	As above	Finance Worker
National Executive Member	Maurice Farrell	As above	Finance Worker
National Executive Member	Meghala Nair	As above	Finance Worker
National Executive Member	Paul Everson	As above	Finance Worker
National Executive Member	Sacha Hammersley	As above	Finance Worker
National Executive Member	Sarah Gallagher	As above	Finance Worker
National Executive Member	Steven Howland	As above	Finance Worker
Congress Delegate, Geographical Electorate – NSW/ACT	Julia Angrisano	As above	Paid Official
Congress Delegate, Geographical Electorate – NSW/ACT	Maurice Farrell	As above	Finance Worker
Congress Delegate, Geographical Electorate – NSW/ACT	Sascha Baker	As above	Finance Worker

Name of Office	Name of Office Holder	Postal Address of Office Holder	Occupation of Office Holder
Congress Delegate, Geographical Electorate – NSW/ACT	Jennifer Haviland	As above	Finance Worker
Congress Delegate, Geographical Electorate – NSW/ACT	Tracey-Ann Suggate	As above	Finance Worker
Congress Delegate, Geographical Electorate – NSW/ACT	Penny Stefanou	As above	Finance Worker
Congress Delegate, Geographical Electorate – NSW/ACT	Helen Borlas	As above	Finance Worker
Congress Delegate, Geographical Electorate – QLD	Wendy Streets	As above	Paid Official
Congress Delegate, Geographical Electorate – QLD	Elizabeth Duncan	As above	Finance Worker
Congress Delegate, Geographical Electorate – SA/NT	Jason Hall	As above	Paid Official
Congress Delegate, Geographical Electorate – VIC/TAS	Nicole McPherson	As above	Paid Official
Congress Delegate, Geographical Electorate – VIC/TAS	Annie Lim	As above	Finance Worker
Congress Delegate, Geographical Electorate – VIC/TAS	Isobel Fish	As above	Finance Worker
Congress Delegate, Geographical Electorate – VIC/TAS	Kolby Newland	As above	Finance Worker
Congress Delegate, Geographical Electorate – VIC/TAS	Jessica Wise	As above	Finance Worker
Congress Delegate, Geographical Electorate – WA	<i>Vacant</i>		
Congress Delegate, Geographical Electorate – WA	Damian Egan	As above	Finance Worker
Congress Delegate, Employment Electorate – ANZ	Khushmeet Kaur	As above	Finance Worker
Congress Delegate, Employment Electorate – ANZ	Gaetana Allia	As above	Finance Worker
Congress Delegate, Employment Electorate – ANZ	Christopher Barron	As above	Finance Worker
Congress Delegate, Employment Electorate - Bankwest	Amina Sehic	As above	Finance Worker
Congress Delegate, Employment Electorate – Bankwest	Adam Fay	As above	Finance Worker
Congress Delegate, Employment Electorate – CBA	Johanna Tran	As above	Finance Worker
Congress Delegate, Employment Electorate – CBA	Andrew Swift	As above	Finance Worker
Congress Delegate, Employment Electorate – CBA	<i>Vacant</i>		
Congress Delegate, Employment Electorate – CBA	Kerina Marshall	As above	Finance Worker

Name of Office	Name of Office Holder	Postal Address of Office Holder	Occupation of Office Holder
Congress Delegate, Employment Electorate – CBA	Samantha Halladay	As above	Finance Worker
Congress Delegate, Employment Electorate – CBA	Lisa Neatherway	As above	Finance Worker
Congress Delegate, Employment Electorate – CBA	Allison Cruze	As above	Finance Worker
Congress Delegate, Employment Electorate – CBA	Adrian Thoen	As above	Finance Worker
Congress Delegate, Employment Electorate – RBA	Sarah Gallagher	As above	Finance Worker
Congress Delegate, Employment Electorate – Insurance	Bruno Aloï	As above	Finance Worker
Congress Delegate, Employment Electorate – Insurance	Adam Woodward	As above	Finance Worker
Congress Delegate, Employment Electorate – Insurance	Karen Anthony	As above	Finance Worker
Congress Delegate, Employment Electorate – Insurance	Heather Carr	As above	Finance Worker
Congress Delegate, Employment Electorate – Miscellaneous	William Rue	As above	Finance Worker
Congress Delegate, Employment Electorate – Miscellaneous	Richard Loveday	As above	Finance Worker
Congress Delegate, Employment Electorate – Miscellaneous	Joseph Palma	As above	Finance Worker
Congress Delegate, Employment Electorate – NAB	Tyson Hopgood	As above	Finance Worker
Congress Delegate, Employment Electorate – NAB	Justine Sherwood	As above	Finance Worker
Congress Delegate, Employment Electorate – NAB	Meghala Nair	As above	Finance Worker
Congress Delegate, Employment Electorate – NAB	Helen Cadzow	As above	Finance Worker
Congress Delegate, Employment Electorate – NAB	Miles Dymott	As above	Finance Worker
Congress Delegate, Employment Electorate – NAB	Rupinder Sandhu	As above	Finance Worker
Congress Delegate, Employment Electorate – NAB	Grant Henderson	As above	Finance Worker
Congress Delegate, Employment Electorate – Other Bank	Paul Hay	As above	Finance Worker
Congress Delegate, Employment Electorate – Other Bank	Yvette-Maree Marcelle	As above	Finance Worker
Congress Delegate, Employment Electorate – Other Bank	Paul Everson	As Above	Finance Worker
Congress Delegate, Employment Electorate – Westpac Group	Nicholas Wright	As Above	Finance Worker

Name of Office	Name of Office Holder	Postal Address of Office Holder	Occupation of Office Holder
Congress Delegate, Employment Electorate – Westpac Group	Kerry Scanlan	As Above	Finance Worker
Congress Delegate, Employment Electorate – Westpac Group	Lynda Ellul	As Above	Finance Worker
Congress Delegate, Employment Electorate – Westpac Group	Laura Ibrahim	As Above	Finance Worker
Congress Delegate, Employment Electorate – Westpac Group	Carole Kennedy	As Above	Finance Worker
Congress Delegate, Employment Electorate – Westpac Group	Sarojni Goundar	As Above	Finance Worker
Congress Delegate, Employment Electorate – Westpac Group	Francis Brady	As Above	Finance Worker
Congress Delegate, Employment Electorate – Westpac Group	Filemon Mayo	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Centralised Customer Services	Christine Otto	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Credit Union/Building Society	Tiarne Driscoll	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Mortgage Broker	Stephen Holloway	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	<i>Vacant</i>		
Congress Delegate, Occupational Electorate – Superannuation	Matthew Rowe	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Bradley Pearson	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Jennifer Trevascus	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Helen Alesana	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Caroline Troup	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Kristy Turner	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Sara Knight	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Gabrielle Blair	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Alexander Corbiere	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Superannuation	Peter Lawson	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Technology Services	Steven Howland	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Technology Services	Petra Godfrey	As Above	Finance Worker

Name of Office	Name of Office Holder	Postal Address of Office Holder	Occupation of Office Holder
Congress Delegate, Occupational Electorate – Wealth Management	Guluzar Egilmez	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Wealth Management	Daryl Walter	As Above	Finance Worker
Congress Delegate, Occupational Electorate – Wealth Management	Sharon McLean	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Jennifer Fisher	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Annette Tuyl	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Kathryn Martin	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Katherine Venaglia	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Toni Johnson	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Damian Bartlett	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	John McWhirter	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	John Simpson	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Luke Latter	As Above	Finance Worker
Congress Delegate, Special Electorate – Regional and Remote Communities	Rebecca Turner	As Above	Finance Worker
Congress Delegate, Special Electorate – Disability	Sacha Hammersley	As Above	Finance Worker
Congress Delegate, Special Electorate – Disability	David Luckman	As Above	Finance Worker
Congress Delegate, Special Electorate – Young Adult	<i>Vacant</i>		
Congress Delegate, Special Electorate – Young Adult	James Whitfield	As Above	Finance Worker
Congress Delegate, Special Electorate – First Nations	Adam Fletcher	As Above	Finance Worker
Congress Delegate, Special Electorate – First Nations	Pamela Anderson	As Above	Finance Worker
Congress Delegate, Special Electorate – LGBTQIA+	Nic Wood	As Above	Finance Worker
Congress Delegate, Special Electorate – LGBTQIA+	Jayde Storm	As Above	Finance Worker