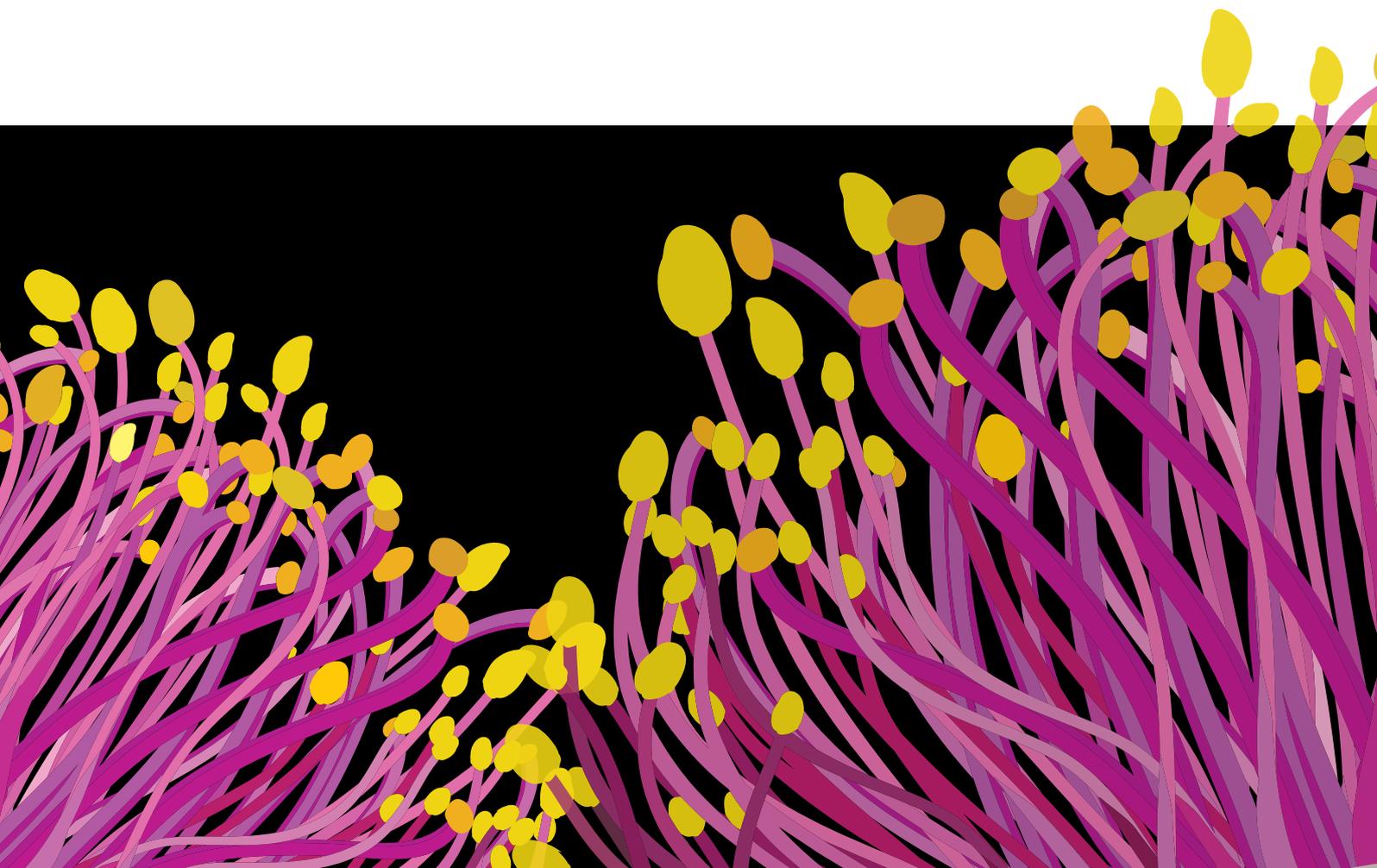


JAN PENTLAND
FOUNDATION

ANNUAL REPORT 2022



Contents

About the Foundation	1
Trustees	1
Report on 2021 – 22	2
Jan Pentland Dinner.....	2
Scholarships.....	2
The 21 scholarship winners in 2022	3
Spotlight on Three Winners	3
Financial statements for 2021 – 22	6

About the Foundation

The Jan Pentland Foundation provides financial assistance, in the form of the Jan Pentland Scholarship, to enable people to study financial counselling or a related discipline. The Foundation focuses on assisting people who may not be able to afford the cost of study without assistance and who are likely to make a contribution to the sector if they became a financial counsellor.

The scholarships are awarded annually at the Jan Pentland Foundation Dinner. The dinner is held during the annual conference of Financial Counselling Australia, the organisation of which Jan was the chair for many years. The Jan Pentland Prize is also awarded during the dinner, but this is not part of the Foundation's work.

Trustees

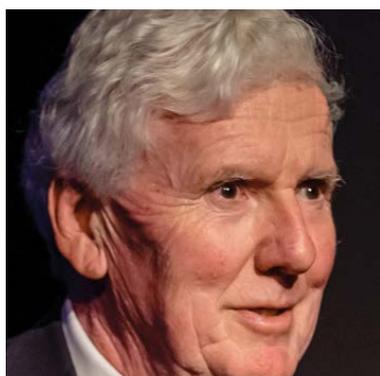
The trustees
of the Jan
Pentland
Foundation



Carolyn Bond
Consumer advocate



David Morawetz
Counselling psychologist



Colin Neave
*Chair of the Jan Pentland
Foundation*



Delia Rickard
*Deputy Chair, Australian
Competition and Consumer
Commission*



David Tennant
*Chief executive officer,
Shepparton FamilyCare*

Report on 2021 – 22

Jan Pentland Dinner

The Jan Pentland Foundation dinner again coincided with the annual Financial Counselling Australia (FCA) conference held this year in Cairns, and was organised by FCA on the Foundation's behalf. The costs of attending the dinner are met by the people attending.

The dinner, "feast by the sea" was held at Hemmingway's Brewery a large venue located on the wharf at Cairns. With over 500 people wanting to attend the dinner however, we also held an overflow event at The Benson restaurant some 600 meters away, streaming the entertainment and formalities. Everyone came together for dessert and dancing.

Scholarships

This year the Foundation awarded 12 scholarships to enable people to become financial counsellors.

In recent years, the Foundation has been able to provide more scholarships thanks to a donation of \$50,000 per annum from the Commonwealth Bank (for 2017-2026).

One scholarship was again funded by the Credit Corp Group, which was awarded to Alicia Nas.

As was the case last year, the Foundation again encouraged applications from people in rural and remote areas. This recognises the difficulties that financial counselling agencies in these areas continue to face in recruiting staff.

The scholarships donations make an enormous difference to those who win them as well as the financial counselling sector, with a number of past scholarship winners going on to leadership positions within sector.

The 12 scholarship winners in 2022

- Abby Bartlett
- Krithi Baskaran
- Michelle Carroll
- Alexander Dunnage
- Caroline Graham
- Katja Hauser
- Sarah Holman
- Alicia Nax
- Sara O'Neill
- Leilani Tasi
- Julie Walter
- Rachel Young

Spotlight on Three Winners

Alicia Nas



Alicia is the manager of the financial capability workers and financial counsellors at the Cairns-based Cape York Partnership. Becoming a financial counsellor was a natural progression for Alicia, and something she had wanted to do for many years, but as a single mother-of-three, there was neither the time nor the money to allow that.

But with all her children now in school, Alicia had a little more time to study the diploma and so decided to apply for a Jan Pentland Scholarship.

Her passion for financial counselling was fueled by a meeting with Jan Pentland at a conference in Melbourne, after which she began working in the sector. Alicia's scholarship was funded by Credit Corp Group, which chose her based on the outstanding contribution she has already made to the sector and her potential for even greater impact.

Krithi Baskaran



As a resident of Lismore, Krithi was impacted by the 2022 NSW floods – her workplace was flooded which in turn caused her significant financial loss. But rather than focusing on her own misfortune, Krithi instead pivoted to what she could do to help her community.

She began volunteering at an evacuation centre and helped develop processes to assist people in cancelling their direct debits for services that could not be used due the interruption to their lives caused by the floods.

Her positive outlook, passion for helping others and innovative interventions will stand Krithi in good stead to become a successful financial counsellor. Krithi is currently studying for the diploma and expects to graduate in mid-2024

Leilani Tasi



Leilani said in her application she was “relatable”. “I know what it’s like to be disadvantaged. I know what it’s like to feel shame and guilt around debt. I know what it’s like to be financially illiterate.” But by the same token, Leilani said she also knows how to help people, to advocate for them and outline the options available to them.

With a career history in service and support, the Sydney-based mum to two toddlers pursued the scholarship to help with the financial cost of a career change – a career about which she felt passionate and was within her skillset. This passion, her own lived experience and belief in second chances made her an outstanding candidate for a Jan Pentland Scholarship.

Financial statements for 2021 – 22

The financial statements for the Foundation are available on the [website](#).

The **Jan Pentland Foundation** was set up to honour the legacy of Jan Pentland. Jan's commitment to financial counselling and to helping low income and disadvantaged people continues through the Foundation's annual scholarship program.

King and Wood Mallesons provided pro bono legal advice to the Foundation in establishing it. Deloitte provided pro bono audit services for the first ten years of its operation. Financial Counselling Australia provides ongoing administrative support to the Foundation.



JAN PENTLAND FOUNDATION

The foundation honours the remarkable Jan Pentland. Jan Pentland's commitment to financial counselling and to helping low income and disadvantaged consumers is the hallmark of her legacy.

The death of Jan Pentland was a huge loss. Many, many people wanted to honour Jan's memory in some way. Setting up a foundation was a tangible way to do this.