



Foundation Newsletter

2019/20 Edition

Shaw and Partners FOUNDATION

Have fun. Live life. Give back.



Cameron Duncan

Shaw and Partners Foundation Chairman

“The Shaw and Partners Foundation remains committed to supporting worthy charities that attract minimal, if any, assistance from the government and, without fundraising support, are unable to generate significant funds on their own. We are driven by the long term effects that are achieved through corporate philanthropy to support those in our community in need.”

Shaw and Partners
FOUNDATION

A message from the Chairman

Cameron Duncan

Despite the challenges of the last 18 months - severe drought, catastrophic bushfires and then the COVID 19 pandemic - the Shaw and Partners Foundation continued to meet the ever-changing conditions and needs of the community. The core approach of empowering our advisers and staff to engage in a variety of fundraising activities with a focus across three broad areas; mental health, education and social inclusion, was largely preserved. In addition, a responsive and flexible attitude led to a shift in the approach to donations, with the weight and consensus of the Shaw and Partners community behind the Bushfire Appeal, and more company-wide fundraising events taking place in a "lockdown" environment.

The Shaw and Partners Foundation corpus has continued to grow and now stands in excess of \$1 million offering a sustainable base from which the Shaw and Partners Foundation will be able to utilise its investment returns for dollar matching, across a broad range of staff led fundraising events on an ongoing basis.

Since the Shaw and Partners Foundation's inception in the second half of 2015, over \$4 million has been raised for charitable causes from the combined efforts of Shaw and Partners advisers, staff, management, board, clients and other supporters. The second half of 2019 saw charities including the Leukaemia Foundation (City2Surf), Children's Medical Research Foundation (Jeans for Genes Day), Oxfam Australia (100km Trailwalker), Cure Brain Cancer (Noosa Triathlon) and Apex Foundation (Outback Postie Ride) supported via event based fundraising in the Shaw and Partners community.

Following the devastating bushfires, at the end of January 2020, staff and management rallied together to champion a major donation using Foundation's reserves in the form of a grant of \$200,000 which was earmarked for charities involved with bushfire relief and assistance. Shaw and Partners staff and management voted to determine which eight charities received a donation of \$25,000 each. Rural Aid, The Foundation for Rural & Regional Renewal, NSW Rural Fire Service, Blaze Aid, Koala Conservation Australia, Wildlife Rescue of SA, WIRES and Wildlife Rescue NSW South Coast were the lucky eight.

The Cancer Council was supported in June 2020 via participation across Shaw and Partners state offices in "Australia's Biggest Morning Tea". Cakes and other treats prepared at home by staff were then distributed on the day, whilst observing strict social distancing, and over \$6,450 was raised for Cancer Council. Also in June, the Brisbane office came together and raised funds for MS Queensland despite the cancellation of the usual cycling event due to COVID. The Foundation matched the impressive \$7,500 raised by the Brisbane office.

In September 2020, Shaw and Partners proudly celebrated five years of the Shaw and Partners Foundation. Following a week of fundraising events and celebrations, the Shaw and Partners Foundation raised and donated an incredible \$819,100 to Australian micro charities across the country.

The Shaw and Partners Foundation continues to be driven by its advisers, staff and management in supporting endeavours they are passionate about, and where there is a relative lack of government funding, the key areas of mental health, education and social inclusion are emphasised. Despite the impediments encountered over this past year, the mantra of "Have fun. Live life. Give back." was still embraced by the Foundation and its supporters.

On behalf of the committee, I would like to express a particular thanks to all the Shaw and Partners staff, advisers, management, board and clients who maintained their support in what was a very challenging year for many.



Cameron Duncan
Shaw and Partners Foundation Chairman

2019/2020 Highlights

SHAW AND PARTNERS FOUNDATION

\$4M RAISED FOR CHARITY SINCE 2015



SINCE INCEPTION IN 2015

OVER 110 CHARITIES SUPPORTED



OUR MOTTO

HAVE FUN. LIVE LIFE. GIVE BACK.



OUR COMMITMENT TO THE COMMUNITY

OVER 170 CHARITY INITIATIVES SUPPORTED



INSTITUTIONAL FOUNDATION DAYS

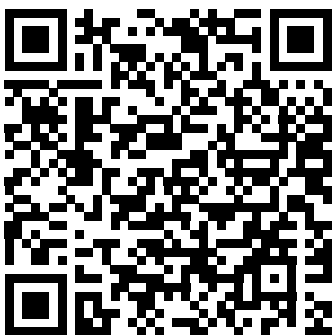
\$1.5M RAISED IN THE LAST 5 YEARS BY THE INSTO DESK



OUR MISSION

TO INSTIL AND PERPETUATE REAL CHANGE IN THE FABRIC OF AUSTRALIAN SOCIETY

SHAW AND PARTNERS FOUNDATION FIVE YEAR ANNIVERSARY



THE SHAW AND PARTNERS FOUNDATION WAS ESTABLISHED IN 2015 TO PROVIDE A PLATFORM FOR GREATER PARTICIPATION IN COMMUNITY SERVICE

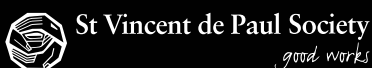
KEY FOCUS AREAS

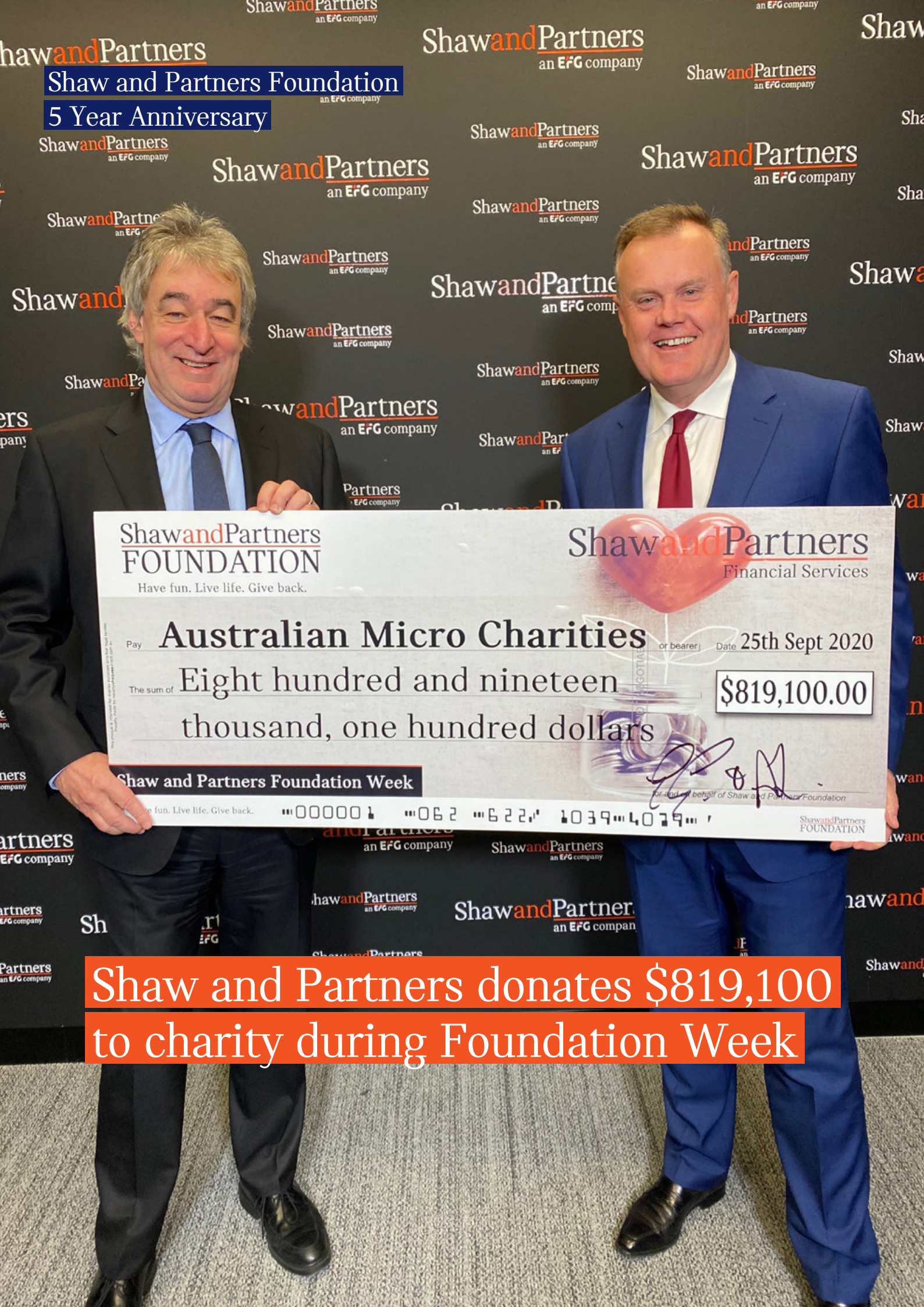
MENTAL HEALTH, EDUCATION, SOCIAL INCLUSION

Main charities supported since 2015



Shaw and Partners FOUNDATION





Shaw and Partners Foundation

5 Year Anniversary

Shaw and Partners
FOUNDATION

Have fun. Live life. Give back.

Shaw and Partners
Financial Services

Pay **Australian Micro Charities** or bearer Date **25th Sept 2020**

The sum of **Eight hundred and nineteen thousand, one hundred dollars**

\$819,100.00

Shaw and Partners Foundation Week

Have fun. Live life. Give back.

⑈00000⑈ ⑈062⑈ ⑈622⑈ ⑈1039⑈ ⑈4029⑈ ⑈

Shaw and Partners
FOUNDATION

Shaw and Partners donates \$819,100 to charity during Foundation Week

Shaw and Partners FOUNDATION

5 DAYS
\$500,000
5 YEARS

During the week of 21-25 September 2020, Shaw and Partners proudly celebrated five years of its charitable Shaw and Partners Foundation, after having raised and donated \$3 million to over 70 Australian charities since its inception in 2015.

To celebrate this milestone, the Shaw and Partners Foundation committed to donate a minimum of \$500,000 to Australian charities across the country, over the five days.

Thanks to the generosity of our institutional clients on the annual Institutional Foundation Day and the commitment of Shaw and Partners Foundation Committee and Shaw and Partners Board, we were thrilled to announce the final donation total of \$819,100 to Australian micro charities.

All six Shaw and Partners offices – Sydney, Melbourne, Brisbane, Adelaide, Perth and Canberra – were given \$75,000 to be donated to charities of their choice, plus an additional \$25,000 to the NSW office due to the majority of employees being based in Sydney. In addition to this, \$150,000 was donated to Gus Worland's Gotcha4Life on Tuesday 22nd of September 2020.

After setting a fundraising target of \$250,000, the Shaw and Partners Institutional Team raised an enormous \$377,000 from the activity of its annual Institutional Foundation Day. Shaw and Partners committed half of the raised funds to the Australian Fund Managers Foundation and the remaining \$188,500 went into the pool of funds to be donated around the country.

On Friday 25th of September 2020, after a week of staff voting and an additional \$5,600 added into the mix during the week of festivities, the Shaw

and Partners Foundation was proud to announce a total donation of \$480,600 across the following charities:

- Mito Foundation
- Mater Little Miracles
- Karinya House
- Marymead
- Connors Run
- MND Victoria
- The Starlight Children's Foundation
- Telethon Kids Institute
- Lou's Place
- Bear Cottage
- The Cardoner Project
- The Hospital Research Foundation - The Neuroendocrine Unit
- Childhood Cancer Association
- YoungCare
- Royal Children's Hospital Foundation
- Cancer Council
- Ricky Stuart Foundation
- Beyond Blue
- The Reach Foundation
- Sacred Heart Mission
- Juvenile Diabetes Research Foundation
- MS Queensland
- Concord Hospital Gastroenterology Contribution Fund
- Black Dog Institute
- The Shepherd Centre
- Cystic Fibrosis WA
- The Heart Foundation WA.

Shaw and Partners remains committed to using the privilege in our industry to effect tangible change in the fabric of Australian society by giving back to the communities we live and work in.

Our commitment: by the ten-year anniversary of the Shaw and Partners Foundation in 2025, the Shaw and Partners Foundation pledges to raise and donate \$10 million to Australian charities.

SHAW AND PARTNERS
FOUNDATION
ANNIVERSARY VIDEO





Shaw and Partners Co-CEOs Allan Zion and Earl Evans



Gus Worland with Shaw and Partners Co-CEO Earl Evans

A message from the CEOs to all Shaw and Partners staff to kick-off the Shaw and Partners Foundation Week.

“To all Shaw staff and advisers,

We want to extend an enormous thank you to everybody for all your efforts and passion over the last five years.

Raising and donating \$3 million to over 70 Australian charities is no small feat and it makes us both incredibly proud of the Shaw and Partners family. Your monthly financial contributions, fundraising efforts, charity events and just the time and passion you have put into giving back has made such an enormous impact on the communities around us.

This week, the Foundation has committed to raise, in just five days, \$500,000 for charity to celebrate the five-year Foundation anniversary. This is such a monumental endeavour and something we hope you are all immensely proud to be part of, as we certainly are. Please take the opportunity to really get involved in all this very special week has to offer, and most

importantly enjoy the celebrations within your offices and really just make the most of it!

From the bottom of our hearts, thank you for all your hard work. We can't wait to see what the next five years entails!”

Earl Evans and Allan Zion
 Shaw and Partners Co-CEOs

Gotcha4Life

At the outset of the Foundation Week, Shaw and Partners committed to donate \$500,000 to charity.

On Tuesday 22nd of September 2020, the Shaw and Partners Sydney office had the pleasure of hosting special guest Gus Worland, founder of Gotcha4Life.

Speaking to staff across the country via Zoom, Gus led an invaluable conversation about breaking through stereotypes to create real and honest connections and fighting the stigma around mental health.

Gotcha4Life was established to reverse the tide of declining mental health and to reduce suicide throughout Australia. Gotcha4Life is a not-for-profit foundation dedicated to taking action and having a positive outcome on mental health.

Shaw and Partners Co-CEO, Earl Evans, and Shaw and Partners Foundation Chairman, Cameron Duncan, presented Gus Worland with a cheque for \$150,000.

Shaw and Partners Foundation’s mission is to encourage real change in Australian society, to provide philanthropic support to charities that have real influence to improve mental health and education outcomes for the less privileged members of society and to promote social inclusion.



From left: Paul Johnston, Mark Hardman, John Bowie Wilson, Scott Coventry, Mike Ryan, Roger Gamble and Victor Nguyen

Institutional Foundation Day

After setting a fundraising target of \$250,000, Shaw and Partners was thrilled to announce that the Shaw and Partners Institutional Team had raised \$377,000 for charity from the activity of its annual Institutional Foundation Day. In its fifth year, the Shaw and Partners Institutional Foundation Day follows a sustained advocacy campaign by its Foundation, to create tangible change in the fabric of Australian society.

Shaw and Partners committed half of the raised funds to the Australian Fund Managers Foundation, which supports Odyssey House, Sydney Children's Hospital, Reach, Life Education, The Katrina Dawson Foundation, Children's Cancer Institute and Go Foundation, and contributed the remaining brokerage to the pool of funds to be donated to Australian micro charities around the country, chosen by Shaw and Partners staff.

Shaw and Partners Head of Equities, Mike Ryan, who has led the initiative for the last five years said: "In a time and a

year when financial support is needed more than ever, it was imperative to our team that we made this year's Institutional Foundation Day a success".

"An enormous thank you to our institutional clients for their unwavering support. It has been humbling and incredibly rewarding to have seen firsthand how some of the charities, who truly are the backbone of Australian society, have benefited from this annual initiative" Mr Ryan added.



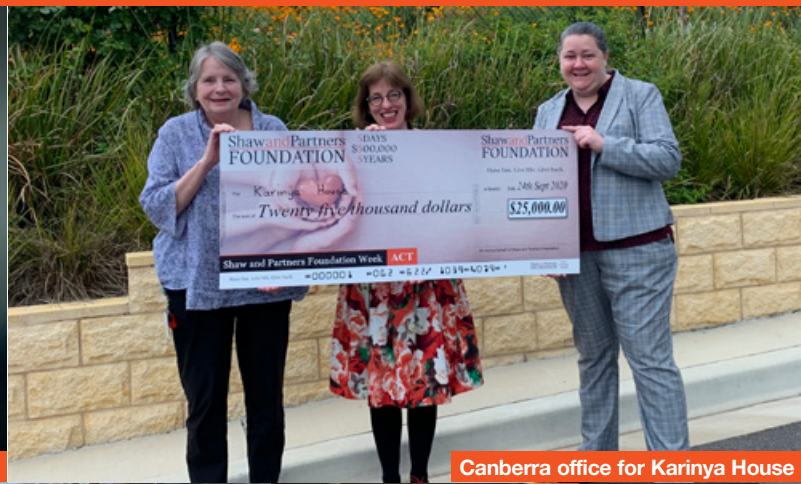
Australian Fund Manager Foundation

The Australian Fund Manager Foundation is a medium-scale charity established in 2008. Their main activity is registered as hospital services and rehabilitation activities primarily serving general community in Australia. The Foundation holds an Awards Night every year to raise funds for Odyssey House and Sydney Children's Hospital.

The Shaw and Partners Foundation has raised and donated over \$650,000 to the Australian Fund Manager Foundation in the last five years.



Perth office for Starlight Children's Foundation



Canberra office for Karinya House



Sydney office for The Shepherd and Black Dog Institute Centre



Adelaide office for JDRE



Brisbane office for MS Queensland



Adelaide office for Neuroendocrine Cancer AU



Brisbane office for Mater Little Miracles



Canberra office for Cancer Council



Brisbane office for YoungCare



Sydney office for Concord Hospital



Sydney office for Bear Cottage and Lou's Place



Adelaide office for JDRF and Mito Foundation



Gus Worland, Founder of Gotcha4Life



INTERVIEW WITH GUS WORLAND, FOUNDER OF GOTCHA4LIFE

Family man. Friend. Footy fan. Founder. Australian radio host and TV personality Gus Worland is the driving force behind mental fitness charity Gotcha4Life.

Gus set up the not-for-profit foundation in 2017 to help people develop the emotional muscle, resilience and social connections needed to build mental fitness and prevent suicide.

Gus' journey

A compassionate bloke, Gus wears his heart on his sleeve. But that heart was shattered the day news arrived that Angus - his friend, mentor and father figure - had taken his life. Angus seemed to have it all - a beautiful family, home, great job, the respect and friendship of many. But he had something else too, inner worries that were eating away at him, and he never told anyone about it. The stigma around masculinity stopped too many from reaching out and asking for help when life felt tough.

Gus was driven to action. In 2016, he hosted three-part documentary series Man Up, lifting the lid on the relationship between masculinity, social isolation, mental health and suicide.

It got attention and created awareness - but Gus knew more was needed. Action. Education. Connection. For everyone. So he left his breakfast radio gig and Gotcha4Life was born.

What does mental fitness mean to Gus?

"Zero suicide, that's my vision. Simple as that. I want a society where everyone has a Gotcha4Life mate. That go-to person you can open up to and rely on about anything. A world where we can seek help when life gets challenging, where we can build open and honest relationships and feel comfortable expressing ourselves, no matter what."

Highlights and impact

Last year, Gotcha4Life funding allowed 37,854 individuals to participate in over 850 workshops or training dedicated to building the mental fitness of the nation.

Tomorrow Man workshops: 81% of participants felt that workshops would "better help them deal with the pressures of being a male". 92% felt "more confident in their ability to have honest conversations with other guys" and 96% of participants would recommend Tomorrow Man to other males.

Tomorrow Woman workshops: 84% of participants reported that the workshop enabled them to feel more comfortable in using their voice amongst their peers and 96% of participants reported that

the workshop enabled them to feel more empowered to have a greater influence and accountability over the woman they want to be.

What's next?

Gotcha4Life will continue delivering educational workshops, training and programs that build the mental fitness of women, men, girls and boys throughout Australia to help reduce instances of poor mental health, related stigma and suicide.

In 2021 and beyond, the foundation plans to broaden services in rural, regional and coastal areas, as well as expand its focus on grassroots sporting communities.



About Gotcha4Life

Gotcha4Life was established to reverse the tide of declining mental health and to reduce suicide throughout Australia. Gotcha4Life is a non-for-profit foundation dedicated to taking action and having a positive outcome on mental health. For more information on Gotcha4Life please visit www.gotcha4life.org



Suzie Georgiou, Dealers Assistant at Shaw and Partners



INTERVIEW WITH SUZIE GEORGIU, SUPPORTER OF MITO FOUNDATION

I started working as a part-time Dealers Assistant at the Shaw and Partners Adelaide office in December 2016, after working for Macquarie for 10 years. In May 2019 I went on maternity leave for the arrival of my third daughter, Dot Winifred Georgiou, with a plan to return to my position in January 2020. At nine days old, Dot was rushed into hospital and stopped breathing on arrival. After four days in hospital, we left very cautious but thankful that we did not lose her and to put it behind us. By three months old, we knew Dot had not developed past the newborn stage, and she was admitted to hospital to be plumped up with a feeding tube and a more comprehensive health review. Three days into her hospital admission, we were told the very shocking news that Dot had Mitochondrial Disease (Mito) and were immediately introduced to the Palliative Team.

We made a plan to show her and her sisters, Elsie and Hattie, a lifetime of only love and happiness and left the hospital to make the most out of each day, whilst the doctors ran tests to find out the type of Mito she had.

In December 2019 as the Cudlee Creek bush fire came through our hometown, we were in the city at the hospital receiving the news that Dot had EARS2

Mitochondrial disease and would live, with the abilities of a newborn, for hopefully years. We celebrated as I phoned in my resignation from Shaw and Partners to focus on caring for Dot. The next day she was rushed to hospital and within a few days we realised that the gift of time was not meant to be. She passed away on 30 January 2020 at home with my husband. I then returned to my position at Shaw and Partners in May this year.

Tell us more about the charity chosen by your office and why it is important to you.

During Dot's short life our community in Lobethal set up Team Dot, a team of walkers who participate in the yearly Bloody Long Walk to raise funds for the Mito Foundation. This year, due to COVID-19 and the ongoing effects on our community from the bushfires, the walking numbers were down - but our spirits were high as a few days before the walk we won the \$25k donation from the Shaw and Partners Foundation – as voted on by my peers in the Adelaide office!

It means so much to me that the Adelaide office pushed the charity for Dot ahead of their own favourite charities to ensure we received the donation.

How will this donation make a difference to the charity?

This donation is important to me as it supports not only much needed research, but also Mitochondrial Disease

awareness campaigns. I did not know that Mito existed before the meeting that changed our lives at the hospital. It is something that is more common than people think, although the type that Dot ended up having was rare – her version has affected only 12 people worldwide to date, that researchers are aware of.

What does it mean to you to be part of an organisation with an ongoing commitment to philanthropic activities?

I am so proud to say that I work for Shaw and Partners, and have made sure my whole community know the brilliant work they do – for so many charities! I think it is important for people to see the heart that lives in our company. If you would like to donate to Team Dot our fundraising page is still running: <https://event.bloodylongwalk.com.au/fundraisers/TeamDot4801/adelaide-2020>.



About Mito Foundation

Mito Foundation supports people affected by mitochondrial disease (mito), funds essential research into the prevention, diagnosis, treatment and cures of mitochondrial disorders, and increases awareness and education about this devastating disease. For more information on Mito Foundation please visit <https://www.mito.org.au>.

Shaw and Partners

an EFG company



Tim Bennett, Senior Investment Adviser at Shaw and Partners

INTERVIEW WITH TIM BENNETT, WINNER OF THE GOLDEN TICKET IN THE PERTH OFFICE.

I joined Shaw and Partners in August 2019 after being at DJ Carmichael for five years as a Senior Investment Adviser. Prior to DJ Carmichael, I worked with Euroz Securities for nine years as an Investment Adviser.

I have a Bachelor of Business Degree (Finance) and I am a Certified Practising Accountant (CPA). My focus is raising capital, managing high net worth clients, specialising in investment strategies for Self-Managed Superannuation Funds and trading Australian blue chip & mid cap shares.

How did you feel about winning the Golden Ticket?

I felt fortunate to have won the Golden Ticket and immediately thought of the two charities I wanted to donate to.

Tell us more about the charity/s you chose and why it is important to you.

Heart Foundation WA – the mother of my daughter died two years ago. She had several heart attacks before she died.

Cystic Fibrosis WA – a good friend of mine has a daughter that has cystic fibrosis. It is a constant battle to remain healthy.

How will this donation make a difference to the charities?

Heart Foundation WA: As part of the Give a Heart Day on the 7th of October 2020, anonymous donors triple matched the \$12,500 Shaw and Partners’ donation so a total of \$50,000 has gone towards heart disease research.

Nearly three times more women die of heart disease than breast cancer in Australia. 10 Australian women die every day from a heart attack. Source: www.victorchang.edu.au.

Cystic Fibrosis WA: \$12,500 has gone towards ongoing research for a cure to Cystic Fibrosis and improve the quality of life of people living with Cystic Fibrosis.

In 1938, when cystic fibrosis was first classified as a disease, children rarely lived beyond their first year of life. By the 1980s, one could expect to live as long as 20 to 25 years. Today, the picture has changed entirely with people living well into their 40s and even 50s, if treatment is started early and adhered to. Source: <https://www.verywellhealth.com/cystic-fibrosis-overview-998213>.

What does it mean to you to be part of an organisation with an ongoing commitment to philanthropic activities?

It means a lot to me to be part of an organisation with an ongoing commitment to philanthropic activities. I am pleased to contribute to the Shaw and Partners Foundation each month. I am grateful I was able to donate to two charities that are personally meaningful to me and assist them with their ongoing efforts against Heart Disease and Cystic Fibrosis.



Tim Bennett was the winner of the Golden Ticket in the Perth office and was able to choose a charity of his choice to donate \$25,000.

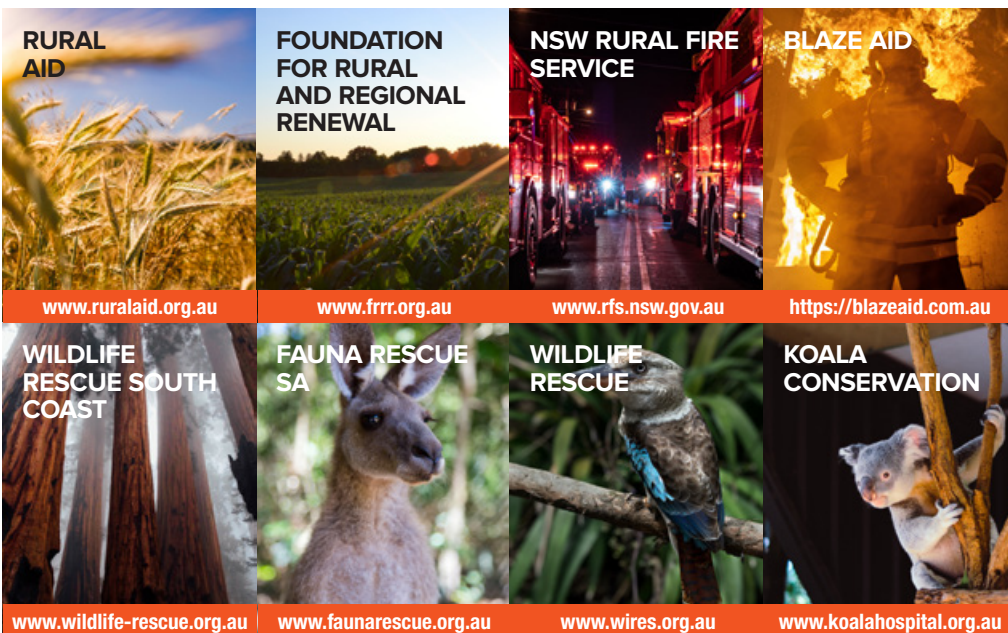




Shaw and Partners was proud to support wildlife rehabilitation, fire services and community rebuilding during the Australian Bushfire Emergency Appeal.

In January 2020, Shaw and Partners committed \$200,000 to charitable causes to assist bushfire relief and donated \$25,000 to eight charities that support wildlife rehabilitation, fire services and community rebuilding. Our thoughts are with those still suffering and we hope the donation assisted in some way those in the community in need.

Charities supported by the Shaw and Partners Foundation





Rainbow Club, Malabar Magic Swim

Several keen Shaw and Partners swimmers participated in the Rainbow Club’s annual Malabar Magic Swim on the 23rd of February 2019. The 2.4km ocean swim took place on Malabar Beach, NSW, raising money for The Rainbow Club which provides a place for disabled children to meet and learn essential skills such as water safety and swimming, whilst providing a place for parents to come together and find support. A formidable ocean swell made the swim even tougher, but Team Shaw and Partners performed very well with several swimmers placing in their respective divisions. \$2,313 was raised for the charity during the event.

Melanoma Institute Australia Paddle Fundraiser

On Saturday 4th of May 2019, Shaw and Partners was the proud sponsor of the Melanoma Institute Australia Paddle Fundraiser, in association with Sydney Harbour Surf Club.

Amateur paddlers bid for the opportunity to race with the legends of the sport, including: world champion ocean surf-ski paddler Cory Hill, Australian Ironman Surf Life Saving Champion Shannon Eckstein and ex-Olympian kayaker Jim Walker, amongst the pros.

The fundraising initiative raised \$25,000 with the support of the Shaw and Partners Foundation which matched, dollar for dollar, all donations up to a cap of \$10,000.

Melanoma is the deadliest of skin cancers and the most common cancer in Australia for those between 15-39 years old. It claims the life of one Australian every five hours.

The Shaw and Partners Foundation was delighted to be involved with such a worthwhile cause that raises awareness and funds research into treatment.

MS Brissie to the Bay

On Sunday 16th of June 2019, eight keen cyclists – Rick Terpstra, Peter Bickel, Nicole Zell, Kristin Kiegerl, Robbie Campbell, Kris Ridgway, Brendan O’Kane and James O’Kane – took it upon themselves to cycle a variety of distances, ranging from 25km to 100km, all in aid of fundraising for MS Brissie to the Bay 2019.

A whopping \$51,809 was raised by the Shaw and Partners Brisbane office, including a donation of \$7,500 by the Shaw and Partners Foundation.

2019 Institutional Foundation Day

On Thursday 27th of June 2019, the Shaw and Partners Foundation announced that it had raised \$200,000 for charity from the activity of its annual Foundation Institutional Day.

As its largest annual fundraiser, the Institutional Foundation Day sees all brokerage generated through institutional trades (on a nominated day) donated to the staff members’ charities of choice. 2019 marked the 4th anniversary of the initiative, where the funds raised were donated in a

50/50 split to the Australian Stockbrokers Foundation and the Australian Fund Managers Foundation.

Shaw and Partners Head of Equities, Mike Ryan said: “Collaboration is an essential component in all of our Foundation’s initiatives, and particularly our annual Institutional Foundation Day where we rely entirely on the generous support of our clients. For the Shaw and Partners Foundation, philanthropy isn’t simply about writing cheques. It is about being engaged and using the resources available to us to galvanise people to do things that haven’t been done before.”

1. **Institutional Foundation Day:** The Insto Desk raised \$200,000 for charity, all in one day! From left: James Diamond, Scott Coventry, Sonya Domazetovski, Head of Equities Mike Ryan, Roger Gamble, John Bowie Wilson, Edward Walker and Sam Kanaan.
2. **MS Brissie to the Bay:** Happy cyclists! From left: Clark Taylor (Fundraising Support Officer for MS), Robbie Campbell, Rick Terpstra, Nicole Zell, Kristin Kiegerl, James O’Kane and Brendan O’Kane.
3. **Malabar Magic Swim:** From left: Nick Tregoning, Jeremy D’Sylva and Jock Rayner showing off the latest Shaw and Partners Speedo’s collection.
4. **Melanoma Institute Australia Paddle Fundraiser:** Paddlers are getting ready to race and raise funds for Melanoma Institute!
5. **MS Brissie to the Bay:** Nicole Zell presented with the MS Platinum award by David McCullagh (MS Representative).



6



7



8



9



10

Comedy for a Cause

On Wednesday 24th of July 2019, the Shaw and Partners Foundation was delighted to partner with Fratelli Fresh to present Comedy for a Cause, raising vital funds for Barnardos Australia.

The event was held at The Comedy Store in Sydney's Entertainment Quarter, Moore Park. 100+ attendees enjoyed all you can eat pizza, popcorn and fairy floss, as they listened to the stellar lineup which included well known acts Susie Youssef and Greg Sullivan. Through ticket sales and a raffle, Shaw and Partners raised just shy of \$10,000 after dollar matching assistance from the Foundation.

Barnardos works together with children, young people and families to break the cycle of disadvantage, creating safe, nurturing and stable homes, connected to family and community.

Sydney City2Surf

On Sunday 11th of August 2019, Shaw and Partners had 15 runners from all areas of the business take part in the annual City2Surf race.

The iconic race started at Hyde Park in the heart of Sydney's CBD and snaked through Kings Cross, Rose Bay and Vaucluse before finishing up in Bondi Beach, totalling 14km in distance.

The Shaw and Partners team was led by Private Wealth Advisers James Seabrook and Kieran Berry and Head

of Financial Planning, Charles Stewart. The team raised over \$3,800 for the Children's Medical Research Institute (Jeans for Genes) with the Shaw and Partners Foundation generously matching all contributions from runners and supporters to total over \$7,600.

Jeans for Genes was established in 1994 by Children's Medical Research Institute to fund revolutionary research that helps diagnose, understand, and find cures or treatments for conditions affecting kids, including genetic diseases, cancer, and epilepsy. www.cmri.org.au

The Mystery Box Rally

On Saturday 17th of August 2019, Shaw and Partners' Head of IT Steven De Vries and co-pilot Anthony Agnello partook in the annual Mystery Box Rally, driving a Shaw and Partners branded 1993 VR Holden Commodore and raising funds for the Cancer Council.

The Mystery Box Rally is an annual event dedicated to raising much needed funds in support of cancer research. It requires participants to drive their own 25+ year old cars along a mystery route in a unique five day challenge.

Steven personally raised \$8,145 through family, friends and colleagues and was able to make a total donation of \$10,145 to Cancer Council with an additional \$2,000 donation from the Shaw and Partners Foundation.

100km Oxfam Trailwalker Sydney

On Friday 23rd of August 2019, Shaw and Partners Senior Investment Advisers John Wardman and Pasquale Lombardo, participated in the 100km Oxfam Trailwalker Sydney.

The Oxfam Trailwalker is an inspiring and challenging event that changes lives. It sees over 700 teams walk through beautiful, rugged bushland from the Hawkesbury to the Harbour.

The team, named for the occasion "I thought they said 10km", raised \$11,122 with the Shaw and Partners Foundation contributing a generous \$5,000 for a total of \$16,122.

- 6. **Sydney City2Surf:** Sydney office advisers and staff getting pumped before the 14km iconic race from Sydney's CBD to Bondi Beach.
- 7. **100km Oxfam Trailwalker:** Pasquale Lombardo and John Wardman proudly raised \$16,122 for charity.
- 8. **Sydney City2Surf:** Smiley faces all around in support of the Children's Medical Research Institute. From left: Russ Jones and Jonathan Mitchell.
- 9. **Comedy for Cause:** Shaw and Partners Foundation Chairman Cameron Duncan welcomes guests to Comedy for a Cause in support of Barnardos Australia.
- 10. **Mystery Box rally:** Head of IT Steven De Vries tests the structure of his 25+ years old car before embarking on a 2000km mystery round trip.



11



12



13



14



15

Parisian Soirée Charity Dinner

On Saturday 27th of July 2019, Shaw and Partners Senior Investment Adviser Jed Richards hosted the second edition of the Parisian Soirée Charity Dinner. The event was held at the award winning Crafers Hotel on the Adelaide hills.

It was a memorable night for over 100 guests who paid for a three course dinner with quality wines and Adelaide's finest French food. Raffle tickets were available to purchase on the night with the top prize, a return flight to Paris for two, generously donated by Flight Centre.

All the proceeds of the evening for a total of \$18,000 were donated to three local charities: Can:Do4Kids, Childhood Cancer and Tutti Arts.

Our congratulations go to Jed Richards for putting together a hugely successful fundraising event!

Apex Foundation Postie Bike Ride

On Thursday 8th of August 2019, Shaw and Partners Investment Advisers James Gerrish and Harrison Watt teamed up with the Shaw and Partners Foundation to participate in the annual Apex Foundation Postie Bike Ride, covering more than 1,100km through the South Australian Outback.

The purpose of the ride is to raise funds for the Apex Copper Coast Retreats, in support of Cancer Council SA. "It was a tougher ride than we thought – cold, plenty

of spills...but we're both in one piece and better for the experience," James said.

Our sincerest congratulations to James and Harry who raised over \$29,000 with a generous contribution from the Shaw and Partners Foundation!

Connor's Run

On Sunday 15th of September 2019, a team of 10 Melbourne based Shaw and Partners runners took part in Connor's Run, Australia's largest fundraising event for pediatric brain cancer.

In its seventh year, Connor's Run spans a distance of 18.8km from Hampton Beach to Alexandra Gardens; a memorial run honouring the life of 18-year-old Connor Dawes. It's the same track Connor once ran in preparation for his upcoming rowing season and coincidentally, the length of his life.

The Shaw and Partners team, led by David Erskine, Head of Institutional Sales, raised \$5,300 with the Shaw and Partners Foundation contributing a generous \$5,000 for a total raising of \$10,300.

The money raised will help the Robert Connor Dawes Foundation continue funding crucial projects in the areas of research, care and development to fund the science to end brain cancer and support patients.

The Foundation was created in 2013 by Liz Dawes and Scott Dawes in memory of their son Robert Connor Dawes who died from a brain tumour at 18 years of age.

Coolangatta Gold Ironman

Over the 12th-13th of October 2019, Shaw and Partners participated in the Coolangatta Gold Ironman event; a trial of endurance including an open ocean swim, board paddle, surf ski leg and soft sand run.

A team of four high calibre athletes competed in the relay race, representing Shaw and Partners. The team included world champion ocean surf ski paddler and Shaw and Partners Race Team member Cory Hill, multi-Ironman champion Shannon

11. **Parisian Soirée Charity Dinner:** Senior Investment Adviser Jed Richards hands over a \$18,000 cheque to three SA charities Can:Do4Kids, Childhood Cancer and Tutti Arts.
12. **Connor's Run:** Smiley faces all around in support of Robert Connor Dawes Foundation. From left: Lawrie Canty, Catherine Adam, Polly Edwards, Nick McGuire, Richard Nettlefold, David Erskine, Michael Holland and Mark Gray.
13. **Apex Foundation Postie Bike Ride:** Senior Investment Adviser James Gerrish interviews Apex Outback Postie Ride committee member Neil Sawley. Watch interview here: <https://youtu.be/5h7JJsQYsKU>
14. **Connor's Run:** We made it! Richard Nettlefold, David Erskine and Lawrie Canty at the finishing line of Connor's Run 2019.
15. **Coolangatta Gold Ironman:** THE UNBEATABLES! From left: Cory Hill, Shannon Eckstein, Luke Cuff and Louis McAfee victorious on the podium.



16



17



18



19



20

Ekstein, professional surf Ironman Luke Cuff and Gold Coast runner Louis McAfee.

The team took out the win in both the short course (21km) on Saturday and in the long course (41.8km) on Sunday, winning the Coolangatta Gold Men's Open division for the third year in a row. To celebrate the victory the Shaw and Partners Foundation donated \$10,000 to the local charity, The Albatross Nippers.

The Albatross Nippers is a Gold Coast based nipper program for children with special needs. The program aims to promote beach awareness, community spirit and fun all within an inclusive surf lifesaving environment.

Daniher's Drive

On Thursday 10th of October 2019, Shaw and Partners State Manager Mal Cameron and Advisers Kevin Lowther, Marc Cuming, Carl and Jarrod Daffy, Nathan Haslem and Richard Nettlefold partook in the annual Daniher's Drive event, raising money for Fight MND Foundation.

Fight MND was established with the purpose of finding effective treatments and ultimately a cure for Motor Neurone Disease. The Daniher's Drive is about spreading the message to country regions and raising money for the cause.

The four Shaw and Partners branded cars raised just over \$70,000 between them. The Shaw and Partners Foundation contributed a generous \$10,000, bringing the total donation to Fight MND to \$80,345.

Abseil for Youth

On Friday 18th of October 2019, four advisers from the Shaw and Partners Sydney office – Amanda Graham, John Wardman, Tony Doyle and Roger Gamble – abseiled down the 1 Market Street building in the Sydney CBD to raise money for Abseil for Youth.

Abseil for Youth is Sir David Martin Foundation's annual fundraiser. Each year hundreds of brave people face their fears to abseil down a 33 floor/135 metre skyscraper to help raise much needed funds for Triple Care Farm, a unique, holistic treatment centre that helps young people with substance addiction, mental illness, homelessness and unemployment.

This year the Shaw and Partners Team raised over \$8,000 which was generously matched dollar-for-dollar by the Shaw and Partners Foundation, bringing the total donation to \$16,208.

16. Daniher's Drive: From left: Victoria State Manager Mal "Maverick" Cameron with co-pilots Steve "Iceman" Reddish and Alan "Goose" Mitchell raising awareness for Motor Neurone Disease around Victoria's country regions.

17. Abseil for Youth: I'll see you later alligator! From left: Roger Gamble, John Wardman, Amanda Graham and Tony Doyle waving goodbye before abseiling a 33 storey building down.

18. Daniher's Drive: Gents, let's buy a Rolls Royce and go raising money for Neale Daniher's Foundation. From left: Marc Cuming, Jarrod Daffy, Carl Daffy and Alistair Ogilvie.

19. Abseil for Youth: Look, no hands! Amanda Graham on the way down to safety.

20. NSW Police Legacy: Senior Investment Adviser Marcus Droga receives an award for being the highest fund raiser after competing in NSW Police Legacy annual charity boxing event. Marcus personally raised over \$30,000 for NSW Police Legacy and Police Community Youth Clubs NSW during the NSW Police's annual Boxing event with the Shaw and Partners Foundation generously topping up his donation with an additional \$15,000!

Shaw and Partners Foundation attempts to match all donations made by staff dollar for dollar.



21



22



23



24



25

Noosa Triathlon

On a sunny and warm Saturday 3rd of November 2019, Shaw and Partners fielded five teams that made the trek to the Sunshine Coast to compete in the Noosa Triathlon, officially comprising a ~1km swim, 40km ride and 10km run.

Nervous Shaw and Partners competitors, waiting at the start decked out in their sleek branded tri-suits, were greeted with the news that the unfavourable currents and choppy seas would require the swim course to be modified. The event then became a 200m beach run to the point and 1km swim, a 40km cycle and 10km run.

Shaw and Partners' teams and individuals collectively fund raised over \$21,000 for the Cure Brain Cancer charity (before any matching contribution from the Shaw and Partners Foundation).

Shaw and Partners had participants from Brisbane, Sydney, Melbourne and Adelaide offices, with some outstanding performances across the three disciplines, followed up by a great team dinner MC'd by QLD State Manager Colin McKenzie at Ricky's Bar and Grill on Noosa River.

Thanks to Victoria Macarthur-Stanham as Shaw team organiser. Also to Wendy Lansdown / Judith Royal / Brittany Hughes as photographers, and to all the supporters that cheered us on.

Also a big congratulations to the team comprising Kieran Berry, Anthony De

Pizzol and Chris Needham who flew the fundraising flag, raising over \$10,000 for Cure Brain Cancer!

The Legends of the Ocean charity dinner

On Monday 18th of November 2019, Shaw and Partners was delighted to host over 100 people from the WA paddling community at the exclusive charity dinner "The Legends of the Ocean".

The charity event, held at the North Cottesloe SLSC in Perth was part of the Shaw and Partners WA Race Week, one of the biggest events in the Australian ocean paddling calendar with a staggering prize pool of \$200,000 on offer.

The format of the evening included an open panel discussion with some of the best Australian Ironman and Ironwoman athletes and ocean surf ski champions, Ali Day, Shannon Eckstein, Hayley Nixon, Jordan Mercer and Shaw and Partners Race Team members Cory Hill and Michael Booth. For every seat purchased, the Shaw and Partners Foundation committed to donate \$250 to Minderoo Foundation's Flourishing Oceans initiative.

At the end of the evening Shaw and Partners Co-CEO Earl Evans was delighted to hand over a \$25,000 cheque to Andrew Twiggy Forrest's Flourishing Oceans project. The key objective of the Flourishing Ocean Project is to return our oceans to a flourishing state by eliminating overfishing and marine pollution and facilitating world class research.



The Minderoo Foundation is a modern philanthropic organisation. We take on tough, persistent issues with the potential to drive massive change. We incubate ideas and accelerate impact. We push the limits of what is believed possible. Minderoo is independent, forward thinking and seeks effective, scalable solutions. We are proudly Australian, and one of Asia's largest philanthropies, with \$847 million committed to a range of global initiatives. Our team comprises over 75 employees across seven locations. www.minderoo.org/

- 21. **Noosa Triathlon:** This triathlon should be like a walk in the park! LOL. From left: Chris Needham, Kieran Berry, Anthony De Pizzol, Tim Prowse and Cameron Duncan.
- 22. **The Legends of the Ocean charity dinner:** Shaw and Partners Co-CEO Earl Evans (left) with WA State Manager Davide Bosio donating \$25,000 to the Minderoo Foundation.
- 23. **Noosa Triathlon:** Head of Institutional Sales David "Cadel Evans" Erskine completing his 40km bike ride.
- 24. **Noosa Triathlon:** Ready, steady, go! From left: Anthony De Pizzol, Cameron Duncan, Shayne Gilbert, Roger Gamble and Mal Cameron getting ready for the event.
- 25. **The Legends of the Ocean charity dinner:** From left, the Legends in person: Shannon Eckstein, Ali Day, Cory Hill, Michael Booth, Jordan Mercer and Hayley Nixon.



26



27



28



29



30

Australia's Biggest Morning Tea

On Thursday 11th of June 2020, Shaw and Partners proudly took part in Australia's Biggest Morning Tea, with all Shaw and Partners staff and advisers coming together for a great cause and raising money for the Cancer Council.

It was a morning tea like no other, with so many delicious treats and savoury goodies on offer, thanks to the great bakers of Shaw and Partners and to our regular caterers who also came to the party with some tasty donations.

With staggered guests participating throughout the morning, in line with COVID-19 regulations, Shaw and Partners managed to raise \$6,450 across the country. The Shaw and Partners Foundation generously committed to match the contributions dollar for dollar, bringing the total amount raised for the Cancer Council to \$12,900.

Every dollar raised through Australia's Biggest Morning Tea helps fund Cancer Council's life-saving research, prevention and support programs. For more information on how donations make a difference to those impacted by cancer, go to Cancer Council's Biggest Morning Tea website.

Jeans for Genes

On Friday 7th of August 2020, the Shaw and Partners team all wore their favourite denim in support of "Jeans for Genes Day".

All Shaw and Partners staff and advisers across Australia came together to raise money for the Children's Medical Research Institute for their research.

Jeans for Genes was established in 1994 by Children's Medical Research Institute to fund revolutionary research that helps diagnose, understand and find cures or treatments for conditions affecting kids, including genetic diseases, cancer and epilepsy.

The Shaw and Partners Foundation generously committed to match the contributions by staff dollar for dollar, bringing the total amount raised for the Children's Medical Research Institute to \$9,134.

- 26. **Australia's Biggest Morning Tea:** Baking all night! Heather Wilson (left) and Angela Holstein prepare a morning tea feast in the Sydney office in support of Cancer Council.
- 27. **Jeans for Genes:** Shaw and Partners in support of Jeans for Genes.
- 28. **Australia's Biggest Morning Tea:** Shaw and Partners is a long standing supporter of Australia's Biggest Morning Tea with Heather Wilson organising delicious breakfasts for over 20 years.
- 29. **Australia's Biggest Morning Tea:** So much food! Head of Professional Standards-Advice Sean Dessaix doesn't know where to start or to stop!
- 30. **Jeans for Genes:** No double denim for Shaw and Partners staff this year. Only delicious cup cakes.

The majority of Shaw and Partners staff and advisers financially contribute to the Foundation in the form of a monthly monetary donation and/or by volunteering their time.





ShawandPartners FOUNDATION

Have fun. Live life. Give back.

Sydney | Melbourne | Brisbane | Adelaide | Canberra | Perth