



Foundation Newsletter

2023

Shaw and Partners

an EFG company

Shaw and Partners
FOUNDATION

RUSSELL KARLSON

Shaw and Partners
Foundation Chair



“2023 has proved to be another marquee year for the Shaw and Partners Foundation. Thank you to my dedicated Committee Members and to everyone at Shaw and Partners who give so generously to this extraordinary Foundation”.

A message from the Foundation Chair

Russell Karlson

My third year as Chair of the Shaw and Partners Foundation was marked by a record year of giving, with over \$1.25 million donated to more than 60 inspiring charities across Australia.

Our 8th year of empowering advisers and staff to fundraise, volunteer, and support charities in their local communities has now resulted in over \$9 million donated to more than 200 charities, a tremendous effort from everyone involved.

In our 2023 annual report, we highlight the significant contributions made by our team, exemplified on the front cover with our Institutional Equities Team who, every year, give up a day's brokerage to donate to charity. I would like to take this opportunity to thank all of our special institutional clients who get involved and support our Institutional Foundation Day each and every year.

Through our extensive corporate partnerships, we also have the opportunity to partner with and contribute to community events and giving days. Shaw and Partners' sponsorship of the Manly Warringah Sea Eagles saw us team up with players and staff to raise funds for a local charity, Bear Cottage, which supports children (and their families) requiring paediatric palliative care. The Foundation donated \$5,000 to Bear Cottage in exchange for Manly stars like Daly Cherry-Evans and Tom Trbojevic shaving their heads!

Every Shaw and Partners office around the country gets involved in donating, participating in events, and volunteering for worthy charities doing great work in their local community. This was no exception in 2023. As part of our 8th anniversary and 8 years of giving, 25 charities, chosen by advisers and employees, received a share of \$160,000.

All of our giving is featured in the pages ahead, but I wanted to highlight a number of the great initiatives from each office below.

In Perth, advisers, clients, and staff celebrated the Starlight Foundation on the Swan River at twilight. I also had the privilege of attending the Ear Science Institute Australia's Gift of Hearing Appeal, where the Foundation gave one underprivileged person the gift of hearing with a fully funded hearing device. The Perth team also celebrated a \$25,000 donation to What Ability, the WA Cancer Council's Biggest Morning Tea, and supported Adviser Taylor Chircop's ride in the MACA Cancer 200 Ride, raising over \$10K towards the fight against cancer.

Our Sydney office had no shortage of fundraising events this year, too many to mention them all here. Our Platinum sponsorship of the Sydney Children's Hospital Foundation Gold Dinner was a definite highlight, helping to raise over \$19 million

for critical care services across the Sydney Children's Hospitals Network – you can read all about this fantastic partnership inside.

The Brisbane team didn't let the side down, with a number of terrific fundraising events including the 3rd Shaw and Partners Annual Brisbane Charity Golf Day, raising over \$34,000 for Gotcha4Life. A huge result and credit to organisers and advisers Shayne Gilbert, Greg Maher, and Brisbane Office Manager Sarah Coulthard.

The Canberra crew are renowned for giving back, and this year was no exception. State Manager Stephen Johnston, along with advisers Nicole Callan and David Maloney, hosted a networking and fundraising evening in aid of Raw Potential Youth, amongst a raft of other charitable giving this year.

Adelaide had a huge year again, topped off in October with \$42k raised for the Mito Foundation through the Bloody Long Walk. The team in Adelaide supports this cause every year, a cause very close to the heart of superstar Adelaide Adviser Assistant Suzie Georgiou, whose daughter passed away from Mitochondrial Disease at just 7 months old. You can see all the great work SA State Manager Fraser MacLeod and the entire team in Adelaide do in giving back to their local communities inside.

Lastly, to the Melbourne team who had numerous charity events, fundraising, and volunteering events, but the What Ability Day at AAMI Park was a highlight this year. Credit to Ben Morrissey for getting the Melbourne Rebels involved on a Sunday to put smiles on the faces of those in the community often sidelined in sports. Great stuff.

Once again, 2023 has proved to be another marquee year for the Shaw and Partners Foundation. Thank you to my dedicated committee members featured ahead and to everyone at Shaw and Partners who give so generously to this extraordinary Foundation. I am looking forward to what the year ahead brings.

Have fun. Live life. Give back.



Russell Karlson
Shaw and Partners Foundation Chair

Shaw and Partners

FOUNDATION

The Shaw and Partners Foundation is dedicated to making a meaningful impact by offering funding and expert advice through various initiatives. Our efforts include providing pro bono consulting services to charities, promoting activity-based fundraising, and extending financial support to our advisers and staff in their fundraising endeavours.



OUR MISSION

Shaw and Partners Foundation's mission is to instil and perpetuate real change in the fabric of Australian society.



OUR MOTTO

**Have fun.
Live life.
Give back.**



OUR PLEDGE

By its 10-year anniversary in 2025, the Shaw and Partners Foundation is committed to raising and donating \$10 million to support Australian charities.



KEY FOCUS AREAS

The Shaw and Partners Foundation's key areas of focus are mental health, education, and social inclusion.

Shaw and Partners Foundation

Highlights in 2023

With a strong focus on mental health, education and social inclusion, we are committed to driving positive change and empowering communities.

\$9,413,700

Shaw and Partners has donated over \$9 million to charity since the Foundation's inception in 2015.

\$700,000

In 2023, our largest donation approached \$700,000, contributed to the Gold Dinner in support of the Sydney Children's Hospitals Foundation.

\$1,286,325

In 2023, Shaw and Partners donated over \$1.2 million to more than 60 charities.

1,200

Every year, advisers and staff members at Shaw and Partners collectively contribute 1,200 hours to volunteering efforts.

\$350,000

In 2023, Shaw and Partners donated over \$350,000 to charities supporting mental health well-being.

450

Since 2015, Shaw and Partners has extended its support to more than 450 philanthropic projects.

208

Over the past nine years, Shaw and Partners has provided assistance to more than 200 different charities.

\$265,532

Over \$260,000 was raised during the 2023 Shaw and Partners Institutional Foundation Day.

Shaw and Partners Foundation

Celebrating eight years of impact

“I strongly believe that companies play an important role in creating and encouraging healthy communities, and that we have an obligation to look at the environments in which we live and work and support organisations that our staff have a connection with.”

Allan Zion, Co-CEO at Shaw and Partners, said while reflecting on the core mission at the launch of the Shaw and Partners Foundation in 2015.

Embracing this belief, the Shaw and Partners Foundation commemorated its eighth anniversary and \$8 million in charitable contributions by challenging each office to spotlight and nominate local charities doing exceptional work within their communities. This initiative aimed to distribute a shared \$160,000 among the selected organisations, demonstrating our commitment to fostering vibrant, supportive communities.

On Friday, 17th of March 2023, Shaw and Partners was honoured to celebrate this milestone by donating \$160,000 to 25 deserving charities. This initiative underscores our dedication to giving back and supporting causes that have a profound impact on people's lives.

CHARITY NAME	OFFICE	NOMINATED BY
Orange Sky	Sydney	Heather Wilson
Soldier On	Sydney	Lindsay Archibald
ProjectKindness	Sydney	Amanda Graham
Autism Swim	Sydney	Paul Johnston
Camp Quality	Brisbane	Colin McKenzie
Brisbane Youth Service	Brisbane	Gary Vidler
Canteen	Perth	Garry Giblett
Homelessness We Care	Perth	Davide Bosio
Blaze Aid	Perth	Derek Steinepreis
Type 1 Diabetes Family Centre	Perth	Brent Becroft
Hutt St Centre	Adelaide	Ash Kelly
RSPCA SA	Adelaide	Mark Landau
MITO Foundation	Adelaide	Suzie Georgiou
Starlight Children's Foundation	Adelaide	Michael King
Story Dogs	Melbourne	Briony Mensforth
The Push Up Challenge	Melbourne	Peter Kerkvliet
Sacred Heart	Melbourne	Alastair Ogilvie
Starlight Children's Foundation	Melbourne	James Nicolau
The Male Hug	Melbourne	Nick Taylor
Cool Australia Trust	Melbourne	Richard Nettlefold
Batten Disease Australia	Melbourne	Ben Morrissey
Fearless Women	Canberra	Sam Elliott
Lifeline Canberra	Canberra	Ross Trimboli
Oz Harvest Canberra	Canberra	Neil Robertson & Nicole Callan
MS Canberra	Canberra	Neil Robertson & Nicole Callan

“The Shaw and Partners Foundation aims to match all donations made by staff dollar for dollar”

17 MARCH 2023



Watch the Foundation's eighth-year anniversary celebration video



SCAN HERE

Our gratitude extends to the Shaw and Partners Board of Management, advisers, and staff, whose generous contributions have been instrumental to our Foundation's success over the years. Their commitment has enabled us to make meaningful differences in the community.

We are proud to recognise the 25 charities chosen by our employees, each close to their hearts, as recipients of the \$160,000 donation. This gesture reflects our collective journey towards creating a more supportive, engaged, and compassionate community.

By continuing to support charities that make a tangible impact, we reinforce our belief in the power of collaboration and community. Together, we are not just donating; we are investing in a vision of a healthier, more compassionate world.

\$160,000

DONATED TO CHARITY DURING THE FOUNDATION'S EIGHTH-YEAR ANNIVERSARY



A big cake for a big celebration!



Davide Bosio and Russell Karlson (Perth)



Cup cakes for everyone in the Canberra office

Charities nominated by Shaw and Partners advisers and staff members

ADELAIDE OFFICE

Hutt St Centre Adelaide (nominated by Ash Kelly). Hutt St Centre is a place of connection and support, where people facing homelessness are empowered to rebuild their lives, rediscover their identities and reconnect with those who love them. <https://www.huttstcentre.org.au>

RSPCA SA (nominated by Mark Landau). Dedicated to improving the lives of all animals across SA. This nomination arose following news that the RSPCA has been forced to turn back people wanting to surrender animals at its Lonsdale shelter for the first time since opening in 1979 due to being inundated with abandoned pets. <https://www.rspcasa.org.au/out-of-room-rspca-sa-forced-to-close-the-gate>

MITO Foundation (nominated by Suzie Georgiou). Mito Foundation supports people affected by mitochondrial disease (mito), funds essential research into the prevention, diagnosis, treatment and cures. <https://www.mito.org.au>

Starlight Children's Foundation SA (nominated by Michael King). Sick children and young people need more than the exceptional care that our clinicians can offer.

They need the social and emotional support that lets them be a child. <https://www.starlight.org.au>

BRISBANE OFFICE

Camp Quality (nominated by Colin McKenzie). Provides programs and services to help families build optimism and resilience through community education and fun. Camp Quality's purpose is to be a source of positivity and support for kids impacted by cancer and their families. <https://www.campquality.org.au/>

Brisbane Youth Services (nominated by Gary Vidler). Assists vulnerable young people to find and maintain appropriate housing, address physical and mental health issues, and establish successful relationships and support networks. <https://brisyouth.org>

CANBERRA OFFICE

Fearless Women (nominated by Sam Elliott). Fearless Women provides girls and young women in the ACT with a dedicated outreach and support service. <https://fearlesswomen.org.au>

Lifeline Canberra (nominated by Ross Trimboli) - Lifeline Canberra exists to support

people in crisis and save the lives of those experiencing thoughts of suicide. <https://www.lifelinecanberra.org.au>

Oz Harvest Canberra (nominated by Neil Robertson and Nicole Callan). OzHarvest Canberra started rescuing food in 2008. With two yellow vans, the team rescues over 7,000 kgs of surplus food, delivering nearly 22,000 meals every week to people in need throughout the region. <https://www.ozharvest.org>

MS Canberra (nominated by Neil Robertson and Nicole Callan). Australia's national multiple sclerosis (MS) not-for-profit organisation that empowers researchers to identify ways to treat, prevent and cure MS. <https://www.msaustralia.org.au>

MELBOURNE OFFICE

Story Dogs (nominated by Briony Mensforth). To make reading fun for children, so they become confident lifelong readers. <https://www.storydogs.org.au>

The Push Up Challenge (nominated by Peter Kerkvliet). Raising funds for Lifeline, Movember and Push For Better. <https://www.thepushupchallenge.com.au>



Anastasia Hanna, Amanda Graham and Angela Holstein (Sydney)



Morning tea under way in Sydney



Enrico Barbieri (Melbourne)



Let the celebration begin!

Sacred Heart Mission (nominated by Alastair Ogilvie). Every day of the year, Sacred Heart Mission assists hundreds of people who are experiencing homelessness or disadvantage to find shelter, food, care and support. <https://www.sacredheartmission.org>

Starlight Foundation (nominated by James Nicolau). Sick children and young people need more than the exceptional care that our clinicians can offer. They need the social and emotional support that lets them be a child - <https://www.starlight.org.au>

The Male Hug (nominated by Nick Taylor). Committed to raising awareness and prevention education for men's mental health for professional males. <https://themalehug.com.au>

Cool Australia (nominated by Richard Nettlefold). Creating evidence-based, curriculum-aligned education resources that help teachers and parents weave real-world issues through the theory students need to know. <https://www.coolaustralia.org>

Batten Disease Support & Research Association Australia (nominated by Ben Morrissey). Batten disease is a family of rare, fatal neurodegenerative disorders that primarily affect children. <https://www.battendisease.org.au>

PERTH OFFICE

Canteen (nominated by Garry Giblett). Supports 12-25 year-olds dealing with their own diagnosis, a close family member's cancer or the death of a loved one. They also now help parents, because when they cope better with cancer and communicate openly, their children are likely to experience less distress and anxiety. <https://www.canteen.org.au>

Homelessness We Care (nominated by Davide Bosio). Local Perth charity established by Jane Armstrong and her partner Sim. The donation will go a long way for this charity providing food and services to those living rough in and around Perth. <https://www.facebook.com/homelessness.we.care.perth>

BlazeAid (nominated by Derek Steinepreis). This donation will help BlazeAid volunteers repair and replace fences and other structures damaged by the fires in and around Donnybrook. BlazeAid is a volunteer-based organisation that works with families and individuals in rural Australia after natural disasters such as fires and floods. <https://blazeaid.com.au>

Type 1 Diabetes Family Centre (nominated by Brent Becroft). The Type 1 Diabetes Family Centre provides support for children with type 1 diabetes and their families. <https://www.type1familycentre.org.au>

SYDNEY OFFICE

Orange Sky (nominated by Heather Wilson). This donation will provide people doing it tough and rough living on the streets with a warm shower and clean laundry. <https://orangesky.org.au>

Soldier On (nominated by Lindsay Archibald). This donation will help current and former defence families build new careers, enhance their skills, maintain physical and mental health, and reconnect with family and community, so they can lead meaningful civilian lives. <https://soldieron.org.au/>

Project Kindness (nominated by Amanda Graham). This donation will support the purchase of groceries and household items that are contained in 'Kindness Hampers' and distribution of these to the most vulnerable in our society. <https://projectkindness.com.au>

Autism Swim (nominated by Paul Johnston). This donation will help support the 'Dippers' program run by Autism swim every summer. Dippers is a modified nippers and surf education program, open to all ages and all abilities and run in collaboration with local Surf Life Saving Clubs. <https://autismswim.com.au>



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Shaw and Partners champions inclusivity at What Ability Day at AAMI Park

In a heart-warming display of community spirit and inclusivity, Shaw and Partners co-sponsored the inaugural What Ability Day at AAMI Park on Sunday, 12th of February 2023.

Embodying their commitment to supporting individuals with disabilities, Shaw and Partners is not only a major sponsor of What Ability but also takes pride in playing a pivotal role in this landmark event, aimed at celebrating and empowering those often sidelined in sports. Additionally, Shaw and Partners is a major sponsor of the Melbourne Rebels Academy and is proud to have facilitated the event by inviting a group of players.

The event, spearheaded by What Ability, an organisation dedicated to enhancing the lives of people with disabilities through sports, transformed AAMI Park into a field of dreams for kids of all ages. These enthusiastic participants were given the

rare chance to step onto the famed turf and to interact and play alongside their sporting idols.

Ben Morrissey, Senior Investment Adviser representing Shaw and Partners, expressed immense pride in his association with What Ability. He extended heartfelt thanks to the Melbourne Rebels players and administrators, who generously dedicated their Sunday morning to bring joy to others. Special commendations were given to Jordan Uelese, Lebron Naea, Max Johnson, Michael Tauai, Lenex Tauai, and Anthony Alsop for their passionate involvement.

This event stands as a testament to the power of inclusion and the positive impact it can have on the community.

Shaw and Partners' involvement in What Ability Day not only highlights our dedication to corporate social responsibility but also sets a benchmark for disability-inclusive events.



1. What Ability Day at AAMI Park: A fun day at AAMI Park for children of all ages, interacting and playing alongside their sporting idols.
2. What a team! What Ability arrived in full strength to deliver an enjoyable day for everyone.
3. Shaw and Partners is proud to be a major supporter of What Ability.
4. Joining forces: Ben Morrissey, Shaw and Partners Senior Investment Adviser, together with Melbourne Rebels players and coach.



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Shaw and Partners & Manly Sea Eagles team up for Bear Cottage fundraiser

On Thursday, 23rd of February 2023, the Manly Warringah Sea Eagles and their premier partner, Shaw and Partners, played a pivotal role in a charity event for Bear Cottage, New South Wales' only children's hospice.

The event was marked by the Sea Eagles players shaving their heads and significantly exceeded its initial \$15,000 target.

The fundraising event saw enthusiastic participation from the Sea Eagles' roster, including stars like Daly Cherry-Evans and Tom Trbojevic. Along with fellow players Toff Siple, Lachlan Croker, and others, they bravely volunteered to shave their heads as a symbolic gesture of solidarity with the children and families supported by Bear Cottage.

This event began with a modest target of \$15,000, but the overwhelming response from supporters, players, staff, and corporate partners soon surpassed this goal. Notably, Shaw and Partners stepped up with a generous donation of \$5,000, exemplifying our commitment to community welfare.

The Sea Eagles expressed their gratitude to all donors, especially acknowledging Shaw and Partners for their significant contribution, which was instrumental in the event's success.



\$5,000

DONATED TO BEAR COTTAGE

5. SHAVE IT ALL! Super proud Manly Sea Eagles players after shaving their heads in support of Bear Cottage.
6. Cannot put it back now! A Manly Sea Eagles player looking sharp in a Shaw and Partners barber cape.
7. Tom Trbojevic volunteers to shave his head for a very good cause.
8. Bear Cottage provides support, respite, and end-of-life care for children with life-limiting conditions and their families, in a warm, homelike environment.

zero2hero

TELETHON
KIDS
INSTITUTE



St Vincent de Paul Society
good works

RSF RICKY STUART
FOUNDATION

Schools Plus



Roses in the Ocean
stemming the tide of suicide

MS24 HOUR MEGASWIM

Proudly supporting
Beyond Blue

Mater
Little Miracles



RUOK?
A conversation could change a life.

Cancer
Council



ODYSSEY HOUSE
NEW SOUTH WALES

Shawand FOUNDED

Chris O'Brien
Lifehouse

Barnardos
Australia



Over 450 philanthropic pro

What Ability

raise

Centenary
Institute
life saving
research

Black Dog
Institute

SOLDIER
ON

ASF AUSTRALIAN
STOCKBROKERS
FOUNDATION

JDRF | ONE
RIDE
FOR A WORLD WITHOUT TYPE 1 DIABETES T1D

OPERATION
FLINDERS
A new direction for young people at risk

Sydney
Children's
Hospitals
Foundation

Can:Do
4Kids

outback
futures



Partners FOUNDATION



Projects supported since 2015





9



10



11

Shaw and Partners: a beacon of support at Starlight Children's Foundation sailing event

On Thursday, 23rd of February 2023, Shaw and Partners made a significant contribution to the Starlight Children's Foundation Australia's Twilight Sailing Event, as highlighted by Robbie Gibbs, Shaw and Partners Adviser and member of the Starlight Children's Foundation Advisory Board.

The event, which combined the excitement of twilight sailing with live music at the local marina restaurant, drew around 100 guests, including a dedicated team from Shaw and Partners. Represented by Robbie Gibbs, Blair Spaulding, Brent Becroft, Garry Giblett, and Maddie Wright, Shaw and Partners not only demonstrated their commitment to philanthropy but also actively engaged in the evening's activities.

Shaw and Partners played a pivotal role in the event, extending their involvement beyond mere sponsorship to become

integral to its success. Their commitment was further highlighted by a generous donation of \$5,000, showcasing our dedication to community initiatives.

The event was a celebration of community support, with Shaw and Partners at the forefront. Their presence, combining sailing, lively music, and a noble cause, underscored their ethos of social responsibility. This involvement and generous donation exemplified Shaw and Partners' commitment to extending their impact beyond business, actively engaging in and supporting key community causes.

\$5,000

DONATED TO STARLIGHT CHILDREN'S FOUNDATION

Robbie Gibbs expressed deep appreciation for Shaw and Partners' generosity, emphasising the firm's vital role in the success of this distinctive event.



9. Blair Spaulding attending the Starlight Children's Foundation sailing event.
10. Twilight sailing for a keen group of Shaw and Partners advisers to raise money for the Starlight Foundation.
11. Investment Adviser Brent Becroft, in his Shaw and Partners vest, celebrates a great evening of fundraising together with supporters of the Starlight Children's Foundation.



Shaw and Partners donates \$3,000 to Charlie Teo Foundation

Dear Shaw and Partners Foundation, on behalf of our team and myself, Dr. Charlie Teo, I extend our deepest gratitude to the Shaw and Partners Foundation for your generous \$3,000 donation made in February 2023 towards brain cancer research. Your support plays a crucial role in our pursuit of ground breaking discoveries in this challenging field.

Your contribution is not just a donation; it is a beacon of hope that empowers us to continue our work with renewed vigour and determination. Thanks to the Shaw and Partners Foundation, we are able to push the boundaries of what's possible in brain cancer research.

We also wish to express our sincere appreciation to the entire Shaw and Partners Foundation committee for their dedication and commitment to this cause. Your collective efforts are making a tangible difference in the lives of those affected by brain cancer.

With heartfelt thanks,

Mary Bishop
Head of Fundraising
Charlie Teo Foundation

Shaw and Partners donates \$10,000 to Fragile X Foundation

On Sunday, 19th of February 2023, the Shaw and Partners Bridge to Beach marked the inaugural race of the 2023 Shaw and Partners Australian Ocean Racing Series (AORS). For the sixth year running, Shaw and Partners was proud to be the main presenting sponsor of AORS, a national ocean racing series attracting competitors across a number of ocean racing disciplines.

Again in 2023, Shaw and Partners generously committed to match, dollar for dollar, all donations made to the Fragile X Association of Australia during the Bridge to Beach. Shaw and Partners was delighted to donate \$10,000 to Fragile X and renew its support for the year ahead.

- 12. Dr. Charlie Teo: A leading neurosurgeon renowned globally, Charlie is celebrated for providing surgical hope to brain cancer patients who have been deemed beyond help. Not only is he a skilled surgeon, but he is also a highly awarded teacher and now a philanthropist, dedicated to pushing the boundaries of medical science for those facing the most challenging diagnoses.
- 13. The Fragile X Association of Australia is a national not-for-profit organisation dedicated to improving the health and well-being of individuals affected by Fragile X, providing comprehensive support to them and their families. Fragile X is a genetic condition characterised by intellectual disabilities, behavioural and learning challenges, and various physical characteristics. For more information, please visit <https://fragilex.org.au>.

\$3,000

DONATED TO CHARLIE TEO FOUNDATION

\$10,000

DONATED TO FRAGILE X FOUNDATION

Shaw and Partners Institutional Foundation Day!

On Thursday, 30th of March 2023, Shaw and Partners proudly announced that our Institutional Team raised an impressive \$265,532 for charity during the annual Shaw and Partners Institutional Foundation Day.

The Institutional Foundation Day event stands as one of Shaw and Partners' most significant charitable initiatives, with all brokerage generated from institutional trades on a designated day donated to a range of deserving causes.

In 2023, Shaw and Partners pledged \$265,532 to be evenly distributed between the Sydney Children's Hospitals Foundation (SCHF) and the Australian Fund Managers Foundation. Over the last eight years, Shaw and Partners has raised more than \$2,000,000 for charity during Institutional Foundation Day. We congratulate the Shaw and Partners Institutional Team on this remarkable achievement and thank them for their dedication to giving back to the community.

Shaw and Partners remains dedicated to its proactive approach to philanthropy, supporting Australian charities in mental health, education, and social inclusion. Since its inception in 2015, the Shaw and Partners Foundation has donated over \$9 million to more than 200 charities.

Anthony Wilson, Shaw and Partners Head of Equities, who has led the initiative since 2021, expressed his gratitude: "The Shaw and Partners Foundation is honoured to provide a platform through which we can continuously support the Australian Fund Managers Foundation and its charities — such as Lou's Place Women's Refuge, Odyssey House, Mission Australia, and Second Bite — in an ongoing capacity.

The funds raised from our annual Institutional Day will afford the beneficiary charities the opportunity to achieve their sustainable development goals, allowing for their various successful projects to be upscaled more rapidly."

Shaw and Partners extends a heartfelt thank you to our institutional clients for their support over the past eight years.

All brokerage fees generated from institutional trades on a designated day are donated to charity.

\$2,077,622

RAISED DURING INSTITUTIONAL FOUNDATION DAY SINCE 2016

\$265,532
RAISED IN 2023



Smiley faces for the Shaw and Partners Institutional Dealing Team. From left: Mark Hardman, Anthony Wilson (Head of Equities), Michael Stanford, Sam Christie, Christineh Grigorian, Paul Johnston, Edward Walker and Michael De Palma.



\$378,811
RAISED IN 2021



\$377,000
RAISED IN 2020



\$200,000
RAISED IN 2019



\$504,898
RAISED IN 2018



\$241,983
RAISED IN 2017



\$109,398
RAISED IN 2016



14



15



16



17

Shaw and Partners raises \$5,980 during the Sydney Client Appreciation event

On Thursday, 2nd of March 2023, Shaw and Partners hosted a client event at the Art Gallery of NSW and demonstrated their commitment to community support by successfully raising \$5,980 for the Sydney Children's Hospital Foundation.

The contribution was achieved through the sales of raffle tickets, offering a selection of enticing prizes, including a Crown Gift Card and an Apple Gift Card.

The event, attended by over 1,000 Shaw and Partners clients and prospects, featured a keynote address by the Hon. Peter Costello AC, providing an engaging highlight for the evening.

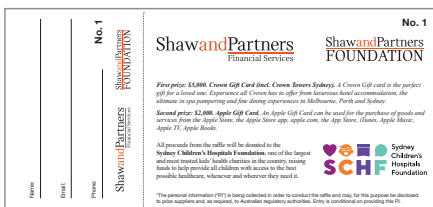
Guests also enjoyed an exclusive viewing of "The End of Imagination" by Adrian Villar Rojas, seamlessly blending the worlds of finance, art, and philanthropy. Hosted by Shaw and Partners Co-CEO Earl Evans and National Head of Private Wealth George Deva, the event was further enlivened by the musical ambiance provided by Dan Fontaine and his Orchestra.

This successful evening not only showcased Shaw and Partners' appreciation for their clients but also underscored our commitment to supporting vital community causes, exemplified by the donation to the Sydney Children's Hospital Foundation.

- 14. Over 1,000 Shaw and Partners clients and prospects attended the Sydney Client Appreciation event at the Art Gallery of NSW.
- 15. The Hon. Peter Costello AC, alongside Shaw and Partners Co-CEOs Earl Evans and Allan Zion, and National Head of Private Wealth George Deva (right), contributed to the evening's success.
- 16. Through the sales of raffle tickets, \$5,900 was raised for the Sydney Children's Hospital Foundation.
- 17. During the evening, Dan Fontaine and his Orchestra provided the musical ambiance.

\$5,980

DONATED TO SYDNEY CHILDREN'S HOSPITAL FOUNDATION





18



19



20



21

Shaw and Partners raises \$34,000 during the annual Brisbane Charity Golf Day

On Friday, 12th of May 2023, the Shaw and Partners Brisbane office, led by Shayne Gilbert, Sarah Coulthard, and Greg Maher, successfully hosted their 3rd annual Charity Golf Day at the scenic Keperra Country Golf Club.

Inviting a mix of clients and prospects, the event aimed to build relationships while supporting a worthy cause. The commitment displayed by all participants was nothing short of inspiring, as they managed to raise an impressive \$24,000 on the greens for Gotcha4Life, an organisation dedicated to improving mental health outcomes.

Embracing the spirit of generosity, the Shaw and Partners Foundation contributed an additional \$10,000, bringing the total funds raised for Gotcha4Life to an astonishing \$34,000. The day saw the active participation of a star-studded team, namely Shaw and

Partners advisers Simeon Caraoutzadis, Andrew Cochrane, and James O’Kane.

The event was filled with excitement, from a live auction to raffles, all in the spirit of raising funds and spreading awareness about mental health. The day was further enriched by the presence of Gus Worland, the founder of Gotcha4Life, who made the journey from Sydney to join the cause, and Ben Dobbin, esteemed Sports Reporter for Nine News Queensland, who generously donated his time to perform the MC duties and coordinate the raffle and auction, making the day truly unforgettable.

Our heartfelt thanks go out to everyone who participated and contributed to this crucial cause. Your support is not merely a donation; it’s a commitment to creating a world where mental health is not an afterthought but a priority.

- 18. Hole in one! Shaw and Partners advisers and clients hitting balls at the 3rd annual Charity Golf Day at the Keperra Country Golf Club.
- 19. Shaw and Partners Senior Investment Adviser Shayne Gilbert welcomes guests attending the fundraising event.
- 20. Ben Dobbin, Sports Reporter for Nine News Queensland, generously donated his time to perform the MC duties
- 21. Andrew Cochrane and Sarah Coulthard, in their Shaw and Partners branded golf gear, are ready to raise some serious funds.

\$34,000

DONATED TO GOTCHA4LIFE FOUNDATION

Meet the Shaw and Partners

Foundation Committee Members

The Foundation Committee encourages all Shaw and Partners employees to get involved in causes they are passionate about.

“At Shaw and Partners, we are passionate about giving back to the communities in which we work and live”.



RUSSELL KARLSON
Foundation Chair



EARL EVANS
Shaw and Partners CO-CEO



AMANDA GRAHAM
Private Wealth Adviser



CAMERON DUNCAN
Co-Head, Income Strategies



BRITTANY HUGHES
General Manager - Wealth
Management | Associate Director



ANASTASIA HANNA
Senior Manager,
Risk and Compliance



FRASER MACLEOD
SA State Manager



ANGELA HOLSTEIN
Senior Private Wealth Adviser



ANDREW HINES
Head of Research

Shaw and Partners FOUNDATION

Have fun. Live life. Give back.

We've asked the Committee Members

Four questions



**Amanda
Graham**

Philanthropic, Proactive,
Compassionate



**Angela
Holstein**

Inspired, Passionate,
Dedicated

Why did you decide to join the Foundation Committee?

When I started at Shaw and Partner in 2015, I approached Simon Martin, the then Chair of the Foundation at the Xmas Party to ask him about it as I've always had a strong personal philanthropy practise and was curious to find out more about the Shaw and Partners Foundation and corporate philanthropy. After that, I just threw myself into helping out with events and administration throughout 2016 and formally joined the Committee in 2017. During that time I've seen a 5 year \$5 million and 8 year \$8 million dollar milestones - \$10 years and 10 million is next!

What's your favourite charity, and why?

Too difficult to answer – all I will say is that I donate to many animal welfare related charities around Australia and I tend towards the smaller charities who receive less government funding and are making a difference in their communities whether that's in NSW, NT, QLD etc. I'm also passionate about other cause areas like poverty and disadvantage, female empowerment and domestic abuse, and children's literacy.

Can you share an experience where volunteering made a significant impact on your life?

Abseiling down a city building pre COVID with a team from Shaw and Partners Sydney office to raise money for Sir David Martin Foundation Abseil for Youth was amazing and lots of fun. Additionally, I have volunteered on three 10x10 Philanthropy Sydney event committees since 2022, and those experiences helped me add to my professional network and skill set, and given me the opportunity to work closely with nine inspiring small Australian charities and learn about what they do and why, what their future aspirations are and how the wider community can support them in those endeavours.

What are your goals or aspirations for our foundation during your tenure?

Continue to advocate for small local grassroots charities around Australia and encourage more activity based fundraising and engagement with philanthropy in Shaw and Partners offices around Australia.

Why did you decide to join the Foundation Committee?

Great things are done by a series of small things brought together" according to Vincent Van Gogh; the Shaw and Partners Foundation is an incredible example of this. Having witnessed exponential growth since its inception, I was really passionate to make a difference and be a part of the future.

What's your favourite charity, and why?

This is a tough question! There are an unbelievable amount of charities out there doing so much good for the community, I hesitate to single one out. However, topical in my mind is Angel Flight. I am fortunate to live within walking distance of a variety of best in breed hospitals, so many families don't have that geographical luxury and Angel Flight bridges that gap. They provide free, professional, safe flight and ground transport services for seriously ill children in rural and regional NSW, ACT and QLD. They also offer the perfect way for pilots to donate their time in offer a sense of community.

Can you share an experience where volunteering made a significant impact on your life?

Volunteering at Coogee Surf club for the Minnows programme has been life changing. To see the children grow and overcome fears of the ocean resulting in a cohort of mature Surf Life Savers is immensely rewarding. In my case, the tables have turned and I am now becoming "a bronzie" with my daughter volunteering to be my water safety!

What are your goals or aspirations for our foundation during your tenure?

I commit to implement a clear long-term vision and strategy for the great work of the Foundation and ensure that diversity and inclusion are promoted at all levels.

“The majority of Shaw and Partners staff and advisers contribute to the Foundation through monthly monetary donations and/or by volunteering their time”.



**Cameron
Duncan**

Compassionate, Resilient,
Motivational



**Anastasia
Hanna**

Empathetic, Determined,
Supportive

Why did you decide to join the Foundation Committee?

I have been on the Foundation Committee since inception and was appointed the second Chair of the committee prior to Russell Karlson taking over the reins. Applying to join the Committee reflected a desire to become more involved in philanthropy at a corporate level, having seen the impact at my previous place of employ.

What's your favourite charity, and why?

Motivated by the tragic loss of our younger daughter, Margot, to brain cancer at age 12 in 2017, my focus has been on supporting charities that raise funds for brain cancer research and improved treatments for patients. This has involved participating in many fundraising events to raise funds for both brain cancer and other health related charities, including competing with other Shaw colleagues in the Noosa Triathlon to raise funds for Cure Brain Cancer. Aside from medical charities, I have also twice completed the gruelling Smith Family Challenge which involves 100km of hiking, mountain biking and kayaking to raise funds in support of disadvantaged children.

Can you share an experience where volunteering made a significant impact on your life?

Admittedly most of the volunteering in my household has been on the part of my wife Georgia, who has spent many hours teaching children to draw in the oncology ward at Price of Wales hospital. When I have accompanied her, it has impressed on me the impact that volunteering can make to the quality of other people's lives.

What are your goals or aspirations for our foundation during your tenure?

The goal has been to encourage all staff to maximise their involvement in the charitable endeavours the Foundation is involved in. The evolution of every state office participating in a major event of its choosing that staff get behind and support, has been a powerful driver of a culture of giving at the Shaw and Partners.

Why did you decide to join the Foundation Committee?

When Russell invited me to join the foundation committee, he advised me to ponder the decision, but for me, it was an obvious choice—I immediately accepted. Whether big or small, every contribution makes a significant difference, and I was eager to dedicate my time to creating a positive influence.

What's your favourite charity, and why?

I don't have a specific favourite charity because I believe they all hold equal importance. However, charities that support mental health and empower young women hold a special place in my heart.

Can you share an experience where volunteering made a significant impact on your life?

Although not a volunteering experience, during my first trip to Egypt, my parents took my brother and I to a church dedicated to aiding families in need of essentials we often take for granted. The church also supports children's education and assists young couples who lack the means to finance weddings or establish their first homes. Initially, this came as a shock to me, but as I began earning income, I wanted to contribute and make a difference in these people's lives. For several years now, I've been actively involved in this cause and aspire to continue to do this for the years to come.

What are your goals or aspirations for our foundation during your tenure?

There's a lot that happens behind the scenes that not everyone gets to see. I manage a lot of the administration from circulating requests for committee approvals, sending approvals to finance to ensure donations are made on time to coordinating the meetings and meeting minutes. This is my way of contributing to the foundation, so I hope I can continue to do my bit.

Shaw and Partners honoured to be Platinum Partner of Gold Dinner 2023

On Thursday, 4th of May 2023, Shaw and Partners proudly served as the Platinum Partner for the 2023 Gold Dinner, in support of the Sydney Children's Hospitals Foundation.

Shaw and Partners was honoured to announce that an unprecedented \$19.2 million was raised for critical care services across the Sydney Children's Hospitals Network. This remarkable achievement not only surpassed the ambitious fundraising goal of \$15 million but also exceeded last year's record of \$9.2 million.

Critical care teams, fundamental to the network, offer essential support in various high-stakes situations, including resuscitation in the emergency department, life-saving surgery, or continuous care in the Intensive Care Unit. These dedicated professionals ensure that the sickest children in NSW have the optimal chance for survival and recovery. The funds raised, amounting to \$19.2 million, will be directed towards creating a specialist, purpose-built facility for children affected by cancer.

Shaw and Partners, along with the Shaw and Partners Foundation, was proud to make a significant contribution to the 2023 Gold Dinner, donating close to \$700,000 to the Sydney Children's

Hospitals Foundation. This contribution included funds raised during the Shaw and Partners Institutional Foundation Day in March 2023. Additionally, during the event, Shaw and Partners purchased two bells for the new facilities, symbolising hope and victory, as they will ring each time a child is declared cancer-free.

This historic fundraising achievement stands as a testament to the extraordinary efforts of the Gold Dinner committee members, led by Co-Chairs Joshua Penn and Linda Penn, whose dedication to philanthropy is unmatched.

Special congratulations are extended to Shaw and Partners Co-CEO and esteemed Gold Dinner Committee Member, Earl Evans, for his significant role in this monumental effort.



**Sydney
Children's
Hospitals
Foundation**

\$700,000

**CONTRIBUTED TOWARDS GOLD DINNER 2023 AND
THE SYDNEY CHILDREN'S HOSPITALS FOUNDATION**



Gold Dinner Co-Chairs Linda Penn and Joshua Penn proudly announce a world record-breaking donation of \$19.2 million to the Sydney Children's Hospitals Foundation.



Shaw and Partners Co-CEO Earl Evans (left) and National Head of Private Wealth George Deva proudly attend the 2023 Gold Dinner.

Shaw and Partners is incredibly proud to have played a part in the 2023 Gold Dinner, supporting the invaluable cause of children's health and making a difference in this remarkable event.

Shaw and Partners

Proudly supporting Gotcha4Life Cup

On Thursday, 3rd of August 2023, Shaw and Partners was thrilled to collaborate once again with its long-term partners and friends, the Manly Warringah Sea Eagles, and the Gotcha4Life Foundation, making a significant donation of \$100,000 during the Gotcha4Life Cup.

Complementing this contribution, Sydney Roosters' major partner, Unibet, also donated \$100,000, bringing the total contribution to \$200,000 aimed at supporting mental fitness programs across Australia. For the game, Shaw and Partners generously relinquished their sternum branding, donating this valuable branding opportunity to Gotcha4Life.

The National Rugby League (NRL) match marked the second encounter between the Sea Eagles and the Roosters for the Gotcha4Life Cup, with the Roosters successfully retaining the cup.

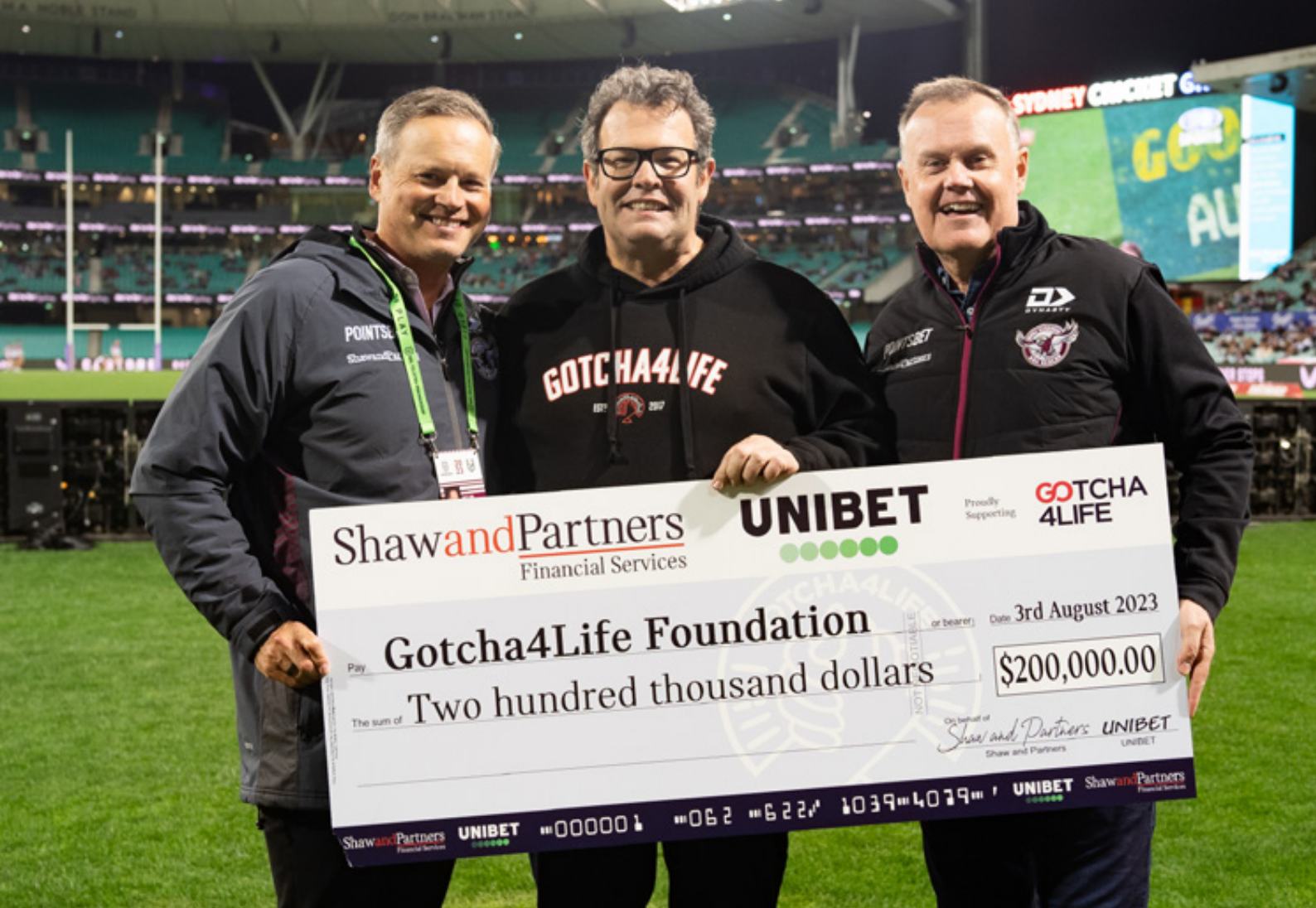
Gotcha4Life is a not-for-profit foundation dedicated to ending suicides by delivering mental fitness programs that engage, educate, and empower various groups such as schools, sporting clubs, workplaces, and community organisations.

The Gotcha4Life Cup serves as a critical platform for reinforcing the importance of mental fitness, facilitating open discussions about feelings and experiences, and equipping individuals with the necessary tools to foster a supportive community.



\$100,000

**DONATED TO CHARITY DURING
GOTCHA4LIFE CUP**



Manly Sea Eagles Chairman Scott Penn (left) with Gotcha4Life Founder Gus Worland and Shaw and Partners Co-CEO Earl Evans

“We are extremely proud to be a major supporter of the Gotcha4Life Cup and its crucial message of building mental fitness,” Earl Evans, Co-CEO at Shaw and Partners, remarked.

“Last night’s match was another thrilling contest between these two very proud clubs, and we eagerly anticipate further expanding the Gotcha4Life Cup next year.”

Mr Evans extended his gratitude towards the Roosters for their commitment to raising awareness of mental fitness alongside Shaw and Partners through the Gotcha4Life Cup, highlighting the mutual effort to promote this vital cause.

He further expressed his company’s enthusiasm for supporting the Gotcha4Life Foundation, stating, “We’re proud to once again partner with the Sea Eagles and Gotcha4Life Foundation on this important initiative.

It’s our aim to help educate and empower Australians on taking positive steps towards their own mental fitness.”

“The incredible work done by Gus and the Gotcha4Life team across the community, through their impactful programs, is of utmost importance. Therefore, we are more than happy to make this significant donation to support their efforts.”



Watch Daly Cherry-Evans's appeal ahead of the Gotcha4Life Cup



SCAN HERE



“Together we can beat MS”

22

23

Shaw and Partners Brisbane office raises \$37,605 during Brissie to the Bay bike ride

Shaw and Partners is thrilled to announce that on Saturday, 12th of June 2023, our Brisbane office team successfully raised an incredible \$27,605 for Multiple Sclerosis Queensland during the annual MS Brissie to the Bay bike ride.

In a show of solidarity and support, Shaw and Partners Co-CEOs, Allan Zion and Earl Evans, were honoured to enhance the generous contributions from our staff and advisers by matching donations up to \$10,000, bringing the total donation to \$37,605!

Rick Terpstra, the driving force behind our participation in this event for six years, shared his thoughts post-event: "The funds we've raised serve as a vital lifeline for countless Queenslanders living with

MS, helping to facilitate essential services such as physiotherapy, counselling, advocacy, and an information line. Moreover, these contributions will aid research efforts aimed at uncovering the root causes of MS and potential cures."

Reflecting on our six-year journey, Shaw and Partners is immensely proud to have contributed in excess of \$360,000 to MS Queensland. This achievement stands as a testament to the power of collective effort for a cause that holds a special place in our hearts.

For more information or to join the fight against MS, please visit <https://www.brissietothebay.com.au>.

22. Together, we can beat MS. Shaw and Partners Senior Investment Adviser Rick Terpstra and Simon Halliday, united at the top of the hill during the Brissie to the Bay bike ride, exemplify the collective effort and determination to make a difference.

23. Rick Terpstra, Nicole Zell, and Simon Halliday (centre), along with the Shaw and Partners Team of riders, are geared up to tackle the 100km ride to combat Multiple Sclerosis, showcasing their readiness and commitment to the cause.



MS Queensland

\$360,000

DONATED TO MS QUEENSLAND SINCE 2017

\$37,605

DONATED TO MS QUEENSLAND IN 2023



24



26



25

Shaw and Partners raises over \$23,000 during Australia's Biggest Morning Tea

On Wednesday, 7th of June 2023, Shaw and Partners proudly hosted nationwide events, raising an impressive \$11,780 in support of cancer research and services.

In a strong show of commitment to our community, the Shaw and Partners Foundation matched this amount, culminating in a total donation of \$23,560 to Cancer Council Australia. This generous contribution will bolster crucial cancer research, support services, prevention programs, and advocacy efforts.

The morning tea was a showcase of culinary talent, featuring a spread of delightful treats and savory delights, all crafted by the skilled bakers within Shaw and Partners.



We were also honoured to have Madeleine Estherby and Sophie Anderson from Cancer Council NSW share insights into the significant impact these events and donations have. Their presentations underscored the value of every contribution in making a difference for those affected by cancer.

For further information on how donations contribute to the fight against cancer, please visit the Cancer Council's Biggest Morning Tea website at <https://www.biggestmorningtea.com.au/>.

A special thanks to Heather and Judy for their relentless dedication to driving this successful initiative in the Sydney office year after year, and to Lisa Nguyen and our wonderful administrative team for their invaluable support.

24. Australia's Biggest Morning Tea: Shaw and Partners break-out areas are set to host a feast of delightful treats and savory delights, all prepared to support this wonderful cause.
25. Cooking all night: Immense gratitude goes to Heather and Judy, who have tirelessly cooked all night, spearheading this initiative for the last 25 years with unmatched dedication.
26. The Biggest Cake for Australia's Biggest Morning Tea: Showcasing the spirit of the event, the most grandiose cake is ready to take centre stage, symbolising Shaw and Partners' significant contribution to this nationwide effort.

\$23,560

DONATED TO CANCER COUNCIL



27



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Miles for Smiles: Shaw and Partners' commitment to charity through endurance events

Ed Russell raises \$5,484 for MS during the May 50K

Shaw and Partners Melbourne Associate Adviser, Edward Russell, is committed to making a difference in the fight against Multiple Sclerosis (MS). "Having witnessed the devastating effects of MS on individuals and their families, I participate in the May 50K fundraiser annually to support MS research, in light of the absence of a cure," stated Ed. Throughout May, Ed ran a total of 100 kilometres, raising \$5,484 with the support of his colleagues at Shaw and Partners.

Fraser MacLeod completes the Vancouver Marathon; Shaw and Partners donates \$10,000 to JDRF

In May 2023, Fraser MacLeod, the Shaw and Partners SA State Manager, journeyed to North America to participate in the Vancouver Marathon. Shaw and Partners extends hearty congratulations

to Fraser for completing the marathon, covering a distance of 42.2 kilometres in under five hours. In recognition of his significant achievement, the Shaw and Partners Foundation has contributed \$10,000 to his chosen charity JDRF.

Shaw and Partners raises over \$17,000 during the Oxfam Australian Trailwalker event

Over the weekend of the 25th-27th of August 2023, three teams from the Shaw and Partners Sydney office united for the Oxfam Australia Trailwalker challenge. Team members John Wardman, Andrew Riad, Michael Crone, James Seabrook, Slava Gorbunov, John Colnan, and Viral Pandya came together to support efforts to eradicate poverty worldwide. The Oxfam Trailwalker is more than a test of physical and mental endurance; it's a vital fundraising event that contributes to fighting poverty globally. The teams successfully raised \$17,000, including a

generous donation from the Shaw and Partners Foundation.

The Shaw and Partners Brisbane office raises over \$1,000 for Women's Legal Service Queensland

On Saturday, 29th of July 2023, the Shaw and Partners Brisbane office participated in the annual River to Rooftop event, a challenging climb of 1,040 stairs to the rooftop of the ONE ONE ONE Eagle Street building. The event aimed to support Women's Legal Service Queensland in their efforts to create safer futures for women and children impacted by domestic violence. The team's dedication resulted in over \$1,000 raised for the foundation.

\$33,484

RAISED WHILE RUNNING FOR A CHANGE



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Hearts and Meals: Shaw and Partners' recipe for community support

Shaw and Partners volunteers support Hope Hospitality Foundation

On Wednesday, 12th of July 2023, Shaw and Partners Sydney staff volunteered at Hope Hospitality Foundation, founded by chef Neil Perry in 2020 to provide nutritious meals to vulnerable community members.

Our team, including Fiona Burton, Brittany Hughes, Angela Holstein, Amanda Graham, Anastasia Hanna, Charlie Khuu, Jon Taylor, and Stephen Thomas, packed and labeled 788 meals, helping to feed thousands through a network of support services across Sydney.

Shaw and Partners donates \$5,000 to Hutt St Centre

On Wednesday, 26th of July 2023, a contingent of advisers and staff from the Adelaide office represented the Shaw and Partners Foundation at the Hutt St Centre, a sanctuary for individuals experiencing homelessness.

For over six decades, the Centre has served as a pivotal element of the Adelaide community, offering a space where those in need can begin to rebuild their lives, reconnect with their identities and loved ones, and access crucial support. Our visit shed light on the various social factors leading to homelessness, such as relationship breakdowns and the ongoing rental crisis in Australia.

Shaw and Partners extends a heartfelt thanks to Chris Burns, the wonderful volunteers, and the courageous clients at the Hutt St Centre for their dedication and resilience, which continue to inspire us.

\$5,000

DONATED TO HUTT ST CENTRE

- 27. Ed Russell, Associate Adviser from Melbourne, ran over 100km in May during the May 50K Challenge.
- 28. River to Rooftop. From left: Simeon Caraoutzadis, Andrew Cochrane, Sarah Coulthard, Gary Vidler, Colin McKenzie, and Jennifer McCoy.
- 29. Oxfam Australian Trailwalker Event. From left: James Seabrook, John Colnan, Andrew Riad, Viral Pandya, Slava Gorbunov, and John Wardman.
- 30. Fraser MacLeod at the Vancouver Marathon.
- 31. From left: Brittany Hughes, Amanda Graham, and Charlie Khuu helping the Hope Hospitality Foundation.
- 32. Shaw and Partners NSW State Manager Fiona Burton (right) helps pack meals with colleagues from the Sydney office.
- 33. Michael King and David Schmidt (left) with volunteers of the Hutt St Centre and Natasha Bartlett, Fraser MacLeod, Suzie Georgiou, and Marcus Campbell (wearing Shaw and Partners caps).
- 34. Advisers and staff members from the Shaw and Partners Adelaide office lending a helping hand to the Hutt St Centre.



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Shaw and Partners raises over \$50,000 during Sydney City2Surf and Seven Bridges Walk

Shaw and Partners raises \$42,000 for R U OK? Foundation during City2Surf

Congratulations to our Shaw and Partners Sydney staff for their outstanding participation in the City2Surf event on Sunday, 13th of August 2023. The team successfully raised over \$21,000 for the R U OK? Foundation. We are thrilled to announce that the Shaw and Partners Foundation matched the funds raised, bringing the total contribution to \$42,000.

We extend our gratitude to everyone involved for their passion, determination in fundraising, and enjoyment of the event. The mission of R U OK? is to inspire and empower individuals to meaningfully connect with people in their lives and offer support to those facing life's challenges.

Shaw and Partners raises \$8,662 during Seven Bridges Walk Challenge

On Sunday, 22nd of October 2023, Shaw and Partners advisers and staff members braved the 28km Seven Bridges Walk Challenge, raising an impressive \$4,331 to support Cancer Council NSW and individuals affected by cancer. The Shaw and Partners Foundation proudly matched this amount, resulting in a total donation of \$8,662. Despite the rain, our team ventured through iconic Sydney locations, including Milsons Point and Darling Harbour.

The Seven Bridges Walk Challenge was first launched by The Pedestrian Council of Australia in 2006, with Cancer Council as the sole charity partner from 2010 to 2021. Since the event began, over \$10.5 million has been raised to fund world-class cancer research and vital support services.

\$50,662

DONATED TO CANCER COUNCIL & R U OK? FOUNDATIONS

- 35. Runners and walkers from the Shaw and Partners Sydney office warm up ahead of the City2Surf event in support of the R U OK? Foundation.
- 36. National Head of Private Wealth George Deva takes a selfie at the finishing line of the City2Surf.
- 37. Brittany Hughes and Emma Tippet (front) with Sean Dessaix and Connie Navarrete on their way to Bondi Beach.
- 38. Shaw and Partners advisers and staff members raised \$8,662 in support of Cancer Council NSW during the 28km Seven Bridges Walk Challenge.





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Shaw and Partners donates \$10,000 to Ear Science Institute Australia

Shaw and Partners was honoured to participate in the Ear Science Institute Australia's Gift of Hearing fundraising dinner, held at the Heath Ledger Theatre in Perth. The event brought to light global hearing loss issues, with a particular emphasis on the challenges faced by indigenous children in rural Western Australia.

Russell Karlson, the Chair of the Shaw and Partners Foundation, had the privilege and honour of attending the evening. Esteemed guests, including the Honourable Malcolm McCusker AC, contributed to the event's significance. The night was enriched with captivating performances by Freeze Frame Opera and the WAAPA Gospel Choir, alongside insightful discussions about hearing loss.

This remarkable evening was a success, raising nearly \$2 million for ear and hearing disorder research. A transformative Change a Life Auction was a highlight of the event. The Shaw and

Partners Foundation proudly donated \$10,000, funding a hearing device that promises to significantly change a life.

Shaw and Partners donates \$10,000 to Sir David Martin Foundation

We are immensely proud of Amanda Graham, Shaw and Partners Investment Adviser and Foundation Committee Member, who took a brave and powerful stand on Tuesday, 20th of June 2023.

As one of the main speakers at the Sir David Martin Foundation's Connect for Youth Fundraising event at the ASX, Amanda's journey is especially inspiring. Having sought help in February 2007, she is now celebrating over sixteen years of sobriety. During this time, she has witnessed countless individuals break free from the cycle of addiction and substance abuse, experiencing life in ways they never thought possible.

The audience was deeply moved by Amanda's story, and the moment was made even more significant when Senior Investment Adviser Angela

Holstein announced the Shaw and Partners Foundation's generous pledge of \$10,000 on stage.

\$20,000

DONATED TO EAR SCIENCE INSTITUTE & SIR DAVID MARTIN FOUNDATION

- 39. The Shaw and Partners Foundation proudly donated \$10,000 to the Ear Science Institute.
- 40. Shaw and Partners Foundation Chair, Russell Karlson, attended the fundraising dinner held at the Heath Ledger Theatre in Perth.
- 41. Amanda Graham, a Shaw and Partners Foundation Committee member, was a main speaker at the Sir David Martin Foundation's Connect for Youth Fundraising event at the ASX.
- 42. Shaw and Partners Foundation Committee members Amanda Graham and Angela Holstein on stage after announcing a \$10,000 donation.



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Shaw and Partners donates \$102,000 during Gotcha4Life 24 Hour Row

Over the weekend of 9th-10th of September 2023, Shaw and Partners proudly served as the major sponsor for the Gotcha4Life Foundation's 24-hour Row, demonstrating its commitment to promoting mental fitness across Australia.

The event witnessed an impressive turnout, with more than 68 teams and 2,500 participants from Surf Life Saving clubs, rowing clubs, schools, gyms, and workplaces nationwide joining forces to support this vital cause.

Together, they raised an outstanding \$400,000, with all proceeds dedicated to delivering Mental Fitness workshops for over 10,000 individuals throughout the country.

In 2023, Shaw and Partners contributed \$102,000, building on the momentum from the previous year's donation of \$100,000 to the 2022 Gotcha4Life 24-Hour Row. Originating from a desire by two members of the Avalon Beach Surf Life Saving Club to address the devastating impact of suicide in their community, the initiative has grown significantly.

Now in its sixth year, the event continues to expand its reach and impact, uniting communities to raise funds and awareness for mental fitness, a critical aspect of overall well-being.

The Gotcha4Life Foundation, a not-for-profit organisation committed to achieving zero suicides, focuses on delivering programs that engage, educate, and empower individuals across various sectors of society, including schools, sporting clubs, workplaces, and community groups.

By supporting the foundation, Shaw and Partners not only contributes financially but also underscores the importance of community involvement and the collective effort required to address mental health challenges.





Shaw and Partners Melbourne advisers and staff: Tanya Dillon, Phoebe Killeen, Olivia Perrignon, Sian Wylie, Ruben Shafraaz, and Eliza Tafengatoto (front row) with Peter Foster, Dane Cunnington, Malcolm Cameron, Alex Henderson, Michael Zeng and Anu Souvannavong after an exhausting rowing session.

We extend our heartfelt thanks to all the staff, participants, and supporters across the nation who actively engaged in this year's Gotcha4Life 24-hour Row.

"Your dedication and enthusiasm not only made the event a success but also played a crucial role in furthering the mission of Gotcha4Life to enhance mental fitness across Australia. Together, we are taking significant steps towards a future where mental health is prioritised, and the goal of zero suicides becomes achievable," said Russell Karlson, Shaw and Partners Foundation Chair, in an email to staff after the event.

"Thanks to all 2,500 participants of the 2023 Gotcha4Life 24-Hour Row. Because of your efforts, we'll be able to help over 10,000 people across the country to build their mental fitness".

Gus Worland, Gotcha4Life Founder

- 43. Gotcha4Life 24-Hour Row. Advisers and staff members at the North Bondi Surf Life Saving Club ready to take on the 24-hour rowing challenge.
- 44. "Row, row, row your boat, gently down the stream." Stuart Lamont, Garth Jeffery, and Domenic Macri, Investment Advisers from the Perth office, rowing for charity at the Sorrento SLSC, WA.
- 45. Lee Moore, Senior Investment Adviser from the Canberra office, completing his rowing shift at the gym specially fitted in the Canberra office boardroom.
- 46. Shaw and Partners is proud to be the major sponsor of the Gotcha4Life 24 Hour Row held at the North Bondi Surf Life Saving Club.

\$102,000

DONATED TO GOTCHA4LIFE FOUNDATION



Suzie Georgiou with husband Kristan Georgiou (left) together with David Schmidt, Fraser MacLeod, David Dall and Natasha Bartlett

Shaw and Partners raises \$42,000 during the Bloody Long Walk

On Sunday, 19th of October 2023, the Shaw and Partners Adelaide office took a significant step towards making a difference by participating in the Bloody Long Walk, directly benefiting the Mito Foundation.

In a heartfelt tribute, Team Dot, named in memory of Dot Georgiou who tragically passed away from mitochondrial disease at just 7 months old, saw over 15 participants from the Shaw and Partners Adelaide office, along with a devoted support crew, tackle this meaningful challenge.

This collective endeavour not only highlighted the team's dedication but also culminated in the remarkable feat of raising \$42,000 for the Mito Foundation. This impressive total was bolstered by a generous contribution from the

Shaw and Partners Foundation, which matched each dollar raised, effectively doubling the donations' impact. The funds raised are earmarked for critical research efforts aimed at uncovering a cure for mitochondrial disease, providing a beacon of hope for families affected by this condition.

Fraser MacLeod, SA State Manager at Shaw and Partners, expressed immense pride in joining forces with Suzie and her family for this cause, extending his gratitude to all who contributed their support generously. The picturesque route from Carrick Hill to Glenelg offered not just a physical challenge but also highlighted the natural beauty of South Australia, adding an unforgettable element to the fundraising endeavour.

Heartfelt congratulations to Team Dot and the entire Shaw and Partners community for their outstanding contribution to combating mitochondrial disease. Your dedication has significantly propelled the Mito Foundation's mission forward, edging us closer to a future where this devastating condition can be overcome.

47. Team DOT! Over 15 participants from the Shaw and Partners Adelaide office, along with a passionate support crew, celebrated at the finishing line of the Bloody Long Walk.
48. Do it for Dot! Over \$42,000 was raised for the Mito Foundation in memory of Dot Georgiou.
49. Suzie Georgiou congratulates Shaw and Partners Investment Adviser Matthew Boase for completing the 35km challenge.
50. We did it! Shaw and Partners Desk Assistants Natasha Bartlett and Suzie Georgiou celebrate at the finishing line.



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“This afternoon has been truly phenomenal! It’s been an honour to walk alongside Suzie and her family, remembering Dot and contributing towards finding a cure for this cruel disease, so that no other families have to endure such pain. The weather was perfect for the 15 walkers from our office, supported by our enthusiastic back-up crew.

On behalf of everyone in the Adelaide office, I extend a huge thank you to all Shaw and Partners colleagues who have contributed to our fundraising. It’s indeed a Bloody Long Walk, but the support from the Foundation is Bloody Awesome! GO TEAM DOT!”

Fraser MacLeod, Shaw and Partners SA State Manager



\$42,000
DONATED TO MITO
FOUNDATION IN 2023

\$148,000
DONATED TO MITO
FOUNDATION SINCE 2020



"EVERY SINGLE CONVERSATION MATTERS. EVERY SINGLE CONVERSATION CAN MAKE A DIFFERENCE".

Gus Worland, Gotcha4Life Founder

Shaw and Partners' commitment to support mental health and suicide prevention

Thursday, 14th of September 2023, was "R U OK? Day", a timely reminder of the importance of connecting with and offering support to someone you know who may be struggling.

We all have people in our circle of friends, family, clients, and colleagues who might not be coping as well as they usually do. The essence of R U OK? Day is to encourage every individual to start a conversation and to ask, "Are you really okay?" Such a straightforward question can make a world of difference.

For Shaw and Partners, our commitment to support mental health and suicide prevention isn't just an annual observance; it's a consistent promise.

\$350,000

DONATED TO CHARITIES SUPPORTING MENTAL HEALTH WELL-BEING.

Shaw and Partners' long-standing partnership with Gotcha4Life and the R U OK? Foundations represent our year-round dedication to advocating for mental well-being.

In 2023 alone, Shaw and Partners has donated over \$250,000 to Gotcha4Life, thanks to initiatives like the Gotcha4Life Cup and the Gotcha4Life 24Hour Row. Additionally, our involvement in the Sydney City to Surf events over the past 12 months has allowed us to contribute over \$100,000 to the R U OK? Foundation.

Both Gotcha4Life, steered by Gus Worland, and R U OK? play pivotal roles in mental wellness. While we support them with funds, it's equally important to include their messages in our daily communications.

For more information about how to build your mental fitness, visit www.gotcha4life.org or www.ruok.org.au/

Together let's continue championing this cause, ensuring everyone within our reach feels valued and supported.



Watch Gus Worland's appeal during R U OK? Day



SCAN HERE



James Gerrish at the Postie Bike Challenge



Taylor Chircop at the MACA Cancer 200 Ride



Felicity Thomas and Candice Bourke at the Barnardos Gifts for Kids Appeal



Fundraising evening in support of Raw Potential Youth

James Gerrish's Postie Bike challenge for children with cancer

On Sunday, 10th of September 2023, James Gerrish, Shaw and Partners Sydney Senior Investment Adviser, embarked on the Postie Bike Challenge. Riding his Honda CT 110 postie bike through the scenic Flinders Ranges in South Australia, James covered 1,200 kms and raised an impressive \$39,650 for the Apex Foundation, supporting children with cancer. Congratulations, James, on your remarkable achievement!

Taylor Chircop's triumph in the MACA Cancer 200 Ride

"I'm thrilled to share that on the 14th-15th of October 2023, I completed the 210km MACA Cancer 200 Ride, joining over 2,000 riders in support of cancer research. Starting as a solo rider, camaraderie quickly formed with Paul, Laszlo, and Dave, as we journeyed together from Optus Stadium to Mandurah and back.

A heartfelt thank you to the Shaw and Partners Foundation and all my supporters. Together, we raised over \$10,266 for this vital cause. This weekend was more than a bike ride; it was a testament to the power of unity and the impact we can make in the fight against cancer. Ready for 2024!" — Taylor Chircop, Investment Adviser at Shaw and Partners.

David Maloney and Nicole Callan's charity evening success

With 120 guests and breathtaking views, the charity event hosted on Thursday, 19th of October 2023, by Shaw and Partners Canberra's Nicole Callan and David Maloney, in collaboration with GENFOCUS, was a stunning success, raising over \$28,000 for Raw Potential Youth. Our heartfelt thanks go to Raw Potential Youth for allowing us to support their crucial work in the community. The stories shared were deeply moving, highlighting the importance of supporting our youth.

Felicity Thomas and Candice Bourke exceed fundraising goals for Barnardos Australia

On Friday, 1st of December 2023, Felicity Thomas and Candice Bourke organised a fundraising event for the Barnardos Australia Gifts for Kids Appeal that exceeded all expectations. Their efforts raised \$9,146 and distributed 366 toys across Australia for Christmas, far surpassing their initial goal of collecting 100 toys. This achievement helped alleviate the financial pressures of the festive season for many families.

We extend our deepest gratitude to all donors and the Shaw and Partners Foundation, whose matching contributions significantly magnified the impact, delivering joy and support to families and children facing challenges during Christmas.

\$87,062

RAISED FROM RIDES, GIFTS AND GALAS



Shaw and Partners Co-CEO Earl Evans with What Ability Founder Steve Dresler (left)

Shaw and Partners donates \$25,000 to What Ability during Shaw and Partners WA Race Week

On Monday, 21st of November 2023, Shaw and Partners was thrilled to welcome over 160 athletes, sponsors and supporters from the paddling community to celebrate both the love for the sport as well as an exciting week ahead full of racing events.

The welcome dinner, which took place at the Sorrento SLSC, was part of the Shaw and Partners WA Race Week, the biggest and richest race week ever staged in ocean ski paddling history, with the world's leading paddlers competing for a staggering prize pool of \$265,000.

The evening's highlights included welcoming speeches from Shaw and Partners Co-CEO Earl Evans and Australian Ocean Racing Series owner Dean Gardiner. This was followed by a Q&A session with the 2023 Coolangatta Gold winners Ali Day and Lana Rogers,

hosted by Race One director Jim Walker. The evening concluded with Steve Dresler, founder of What Ability, discussing the incredible work of his organisation.

The event proved especially meaningful when Shaw and Partners Co-CEO, Earl Evans, presented them with a generous \$25,000 cheque donation towards their NDIS registered support service that empowers individuals through access to professional athletes in their communities.

Founder Steve Dresler saw the benefits first-hand of athletes as support workers. Having faced early retirement through injury, What Ability is the evolution of Steve's innate desire to create a positive impact amongst his peers. He has built a community connecting with children and adults with disabilities.

What Ability

What Ability is an NDIS registered disability support service utilising professional and semi professional athletes as support workers.

What Ability is on a mission to make happiness come first; to enhance the clients' perception of what is possible and take them out into the community to have fun.

What Ability is working towards the recruitment of as many professional and semi professional athletes as possible. Steve hopes to dissolve the stigma around how they are perceived when spending their time away from their sport.

\$25,000

DONATED TO WHAT ABILITY





Shaw and Partners joins forces with What Ability for a morning of fun on the beach for children and adults living with a disability

Shaw and Partners has been a proud partner of NDIS registered disability support service, What Ability, for a number of years.

Founded and led by ex-NRL player, Steve Dresler, What Ability are changing the disability space in Australia; utilising professional and semi-professional athletes as support workers, putting a focus on community access, and most importantly – putting happiness first.

Monday, 21st of November, 2023 was a special day at Sorrento Beach in Perth, when for the second year running we partnered with What Ability as part of our annual Shaw and Partners WA Race Week. Together, Shaw and Partners brand ambassadors and What Ability hosted a morning of fun on the beach for

children and adults living with a disability. We were so pleased to have Sorrento Surf Life Saving Club's Dolphin Program members join in on the session.

Leading the beach fun were Shaw and Partners Brand Ambassadors: Georgia Miller, Lana Rogers, Emily Doyle, Hannah Sculley, Ali Day, Kendrick Louis, Cory Taylor, Riley Fitzsimmons, and Zach, Jake and Mitch Morris.

What Ability is dedicated to enhancing the lives of those living with a disability. The day was filled with laughter and excitement, as everyone participated in a variety of beach games, from board paddling and swimming to lively rounds of beach flags and ball games.

As a major supporter of What Ability, Shaw and Partners made a significant contribution at the WA Race Week Welcome dinner.

Shaw and Partners Co-CEO Earl Evans had the honour of presenting Steve Dresler, founder of What Ability, with a \$25,000 cheque, a gesture that supports Steve's outstanding national work.





George Deva congratulates Louise Baxter



Shaw and Partners was a major sponsor of The CEO Magazine Awards



Shaw and Partners advisers and Foundation Committee members



Larry Emdur, Louise Baxter and George Deva on stage

Shaw and Partners celebrates Not-For-Profit excellence at The CEO Magazine Awards

Shaw and Partners is immensely proud to congratulate Louise Baxter, CEO of Starlight Children's Foundation Australia, for her remarkable achievement in winning the Not-For-Profit Award at The CEO Magazine 2023 Executive of the Year Awards. A truly well-deserved recognition for her outstanding leadership and dedication.

As a major partner of this prestigious event, Shaw and Partners was honoured to have our National Head of Private Wealth, George Deva, present this significant award. It was a night of celebration, attended by a group of Shaw and Partners advisers and Foundation Committee Members, all sharing a passion for community support and philanthropy.

Our commitment at Shaw and Partners extends far beyond finance. We are deeply invested in giving back to the community and since 2015, we have proudly donated over \$9 million to more than 200 charities, reflecting our commitment to supporting not-for-profit organisations.

Thank you to The CEO Magazine for hosting an inspiring awards night and to all the leaders who continue to drive positive change.

"Thank you Shaw and Partners, The CEO Magazine and all those involved in these awards. Thank you for shining a light on individuals and organisations doing amazing things, best practice and importantly, on disruptors. Also truly thankful for your ongoing support of the NFP sector which is so important in serving those in need in our community."

Louise Baxter
Chief Executive Officer & Executive Director at Starlight Children's Foundation Australia





Harry Watt and James Gerrish



Brittany Hughes and Emma Tippett



Wendy Lansdown, Ria Sayon, Sue Gikes and Judy Royal



90s/00s Warehouse Party for the Shaw and Partners Sydney Office

Best-dressed winners at the iconic Sydney Office Christmas Party

The holiday season kicked off with the Shaw and Partners Sydney Office Christmas Party, where winners of the Best-Dressed Competition generously donated their prize money to a charity of their choice.

James Gerrish and Harry Watt, the first prize winners, donated \$5,000 to the Apex Foundation, specifically targeting the Apex Magic Castle Children's Chalet at Smiggin Holes.

"We are thrilled to nominate the Apex Foundation for our donation. The Chalet, built with love and tireless effort by the Apex community, has given countless children unforgettable experiences. However, after four decades of creating magic, the structure now faces a practical challenge – it needs a new roof. Our contribution is aimed at ensuring that this place continues to offer joy and respite to underprivileged and disabled children, preserving the magic for future generations. It's a small gesture towards a cause that makes a big difference."

Brittany Hughes and Emma Tippett, the second prize winners, donated \$1,500 each to ProjectKindness and ReLove, respectively.

"We recently had the opportunity to host Sarah from ProjectKindness in our Sydney office, where Sarah shared insights into the impactful work that ProjectKindness are undertaking in Sydney every single day. Witnessing firsthand the dedication of their very small team and the invaluable service they provide to individuals and communities who need it most deeply resonated with me."

"Supporting ReLove is my way of contributing to sustainability and giving back to the community. ReLove's commitment to repurposing and redistributing resources to those in need is truly inspiring. This donation is not just about the financial support, but also about raising awareness of the importance of reusing and recycling for a better world."

Sue Gikes, Judy Royal, Wendy Lansdown and Ria Sayon, the third prize winners, donated \$2,000 to RSPCA NSW.

"Choosing to donate our prize to RSPCA NSW was a decision close to our hearts. The RSPCA is a beacon of hope for abandoned, neglected, sick, and surrendered animals across the state, offering them a chance at a better life. We believe in the incredible work they do, and it's our way of contributing to the wellbeing of animals in need. By supporting the RSPCA, we're helping to ensure that these animals receive the care and love they deserve. It's a cause that resonates with us deeply, and we're proud to assist in their mission."

\$10,000
DONATED BY BEST-DRESSED WINNERS





Shaw and Partners FOUNDATION

Have fun. Live life. Give back.

Charities supported by the Shaw and Partners Foundation in 2023

Apex Foundation	MS Queensland
Apex Magic Castle Children's Chalet	Orange Sky Australia
Australian Fund Managers Foundation	Oxfam Trailwalker
Australian Jewish Fertility Network	OZ Harvest
Autism Swim	Pound Patrol
Barnardos Australia	Primary Club of Australia
Batten Disease	Project Kindness
Blaze Aid	Raw Potential Canberra
Brisbane Youth Service	ReLove
Camp Quality	RSPCA
Cancer Council	Sacred Heart
Canteen	Shake it Up
Charlie Theo Foundation	Sir David Martin Foundation
Cool Australia Trust	Soldier On
Ear Science Institute Australia	Starlight Children's Foundation
Fearless Women	Story Dogs
Fragile X Association	Sydney Children's Hospitals Foundation
Garvan Institute of Medical Research	Telethon Kids Institute
Gotcha4life Foundation	The Male Hug
Harry Perkins Institute of Medical Research	The Push Up Challenge
Homeless We Care	Tikva Incorporated
Hutt St Centre	Type 1 Diabetes
Lifeline	UIA Refugee Relief
Mito Foundation	Variety Children's Charity

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Noosa | Gold Coast