

“Our mission is to instil and perpetuate real change in the fabric of Australian society.”



Simon Martin, Chairman of the Shaw and Partners Foundation



Simon Martin, Foundation Chairman

Our commitment to date

- Over \$250,000 has been donated to different charities in the 12 months since the Foundation's inception.
- Over 85% of Advisers contribute to the Shaw and Partners Foundation.

Inside this edition

- Chairman's message
- Foundation news
- New Foundation grants
- Our staff in the community
- Partnerships
- Sponsorships

Message from the Chairman

Welcome to the first Shaw and Partners Foundation Newsletter.

It has been nearly 12 months since we formed the Foundation Committee. In that time we have established responsibilities for each individual that sits on the Committee and made some significant donations to a number of charities across our key focus areas: mental health, education and social inclusion.

The highlight of the Foundation's activities to date was the inaugural Foundation Institutional Trading Day, where we raised \$109,398.35 for beyondblue and JDRF. Feedback from our Fund Manager's clients around this initiative was very positive. We have subsequently put the wheels in motion for next year's Institutional Trading Day; with a hope that we can raise even more funds for not-for-profits.

The Foundation has been a supporter of a number of matching grants where Shaw and Partners personnel have participated in raising funds for charities. Some of the events included City 2 Surf (Sydney), Connor's Run (Melbourne), Channel of Bones Surf Ski Paddle (Molokai, Hawaii), Australia's Biggest Morning Tea (Sydney) and Jeans for Genes Day (National). We also raised funds in excess of \$25,000 for Schools Plus, JDRF and beyondblue at our annual Sydney and Melbourne client events.

We are very proud of the Foundation's impact in the philanthropic space over a short 12 month period. My huge thanks goes to our Advisers and staff who continue to contribute to the Foundation on a monthly basis. Equally, it must be noted that the success of the Foundation has been possible due to the ongoing support of Shaw and Partners, who generously contribute by matching all staff/advisers' contributions dollar for dollar to the Shaw and Partners Foundation.

Your ongoing support is testament to the impactful work that the Foundation has undertaken to date. As we look to expand our grants functionality over the next 12 months, I ask you to please continue to dig deep. With your help we are working towards instilling change in the fabric of Australian society.





Channel of Bones – Hawaii

Shaw and Partners Co-Chief Executive Officer / Head of Wealth Management, Earl Evans and colleague, State Manager for Victoria, Malcolm Cameron have recently paddled across a 53km open ocean channel in Hawaii, known as the “Channel of Bones” in the Maui Jim Molokai Challenge. The pair raised an astounding \$84,000 for the Juvenile Diabetes Research Foundation.

“Juvenile Diabetes is such an insidious disease for young children to deal with, so paddling for this cause was phenomenal motivation. It means a lot to us to be able to support people who are doing such a good job” Evans said.

City 2 Surf – Sydney

Shaw and Partners had 14 runners from all areas of the business take part in the annual City 2 Surf race on Sunday 14 August. The iconic race commences in Hyde Park, in the heart of Sydney’s CBD and winds through the Eastern Suburbs, finishing up on Bondi Beach, totalling 14km in distance.

The team, led by Private Wealth Adviser James Seabrook, raised just over \$7,000 for Chris O’Brien Lifehouse, with each and every dollar being matched by the Shaw and Partners Foundation for a total of \$14,000.

Lifehouse is an integrated and focused centre of excellence, offering everything a cancer patient needs in one place, including advanced onco-surgery, chemotherapy, radiation therapy, clinical trials, research, education, complementary therapies and psychosocial support.

The race made for many aching muscles in the office come Monday morning, but all in the name of a most deserving cause. Congratulations team Shaw and Partners!

Foundation Institutional Day

On Wednesday 22 June 2016, we launched our inaugural Foundation Institutional Trading Day. A total of \$109,398.35 in brokerage was generated from institutional trades on the day, every last dollar of which was donated in a 50/50 split to two beneficiary charities: Juvenile Diabetes Research Foundation (JDRF) and beyondblue.

Mike Ryan, Head of Equities said the wheels for next year’s Foundation Institutional Trading Day have already been set into motion, with plans to make it bigger and better than the last, and with a broadened focus on recipient charities.

1. **Channel of Bones – Hawaii:** Earl Evans and Mal Cameron getting ready for the challenge.
2. **Earl Evans with Mike Wilson, CEO of JDRF**
3. **City 2 Surf – Sydney:** Shaw and Partners runners.
4. **City 2 Surf – Sydney:** Kieran Berry and Jonathan Mitchell flexing muscles.
5. **Connor’s Run:** Shaw and Partners runners



White Ribbon

At the 2015 Sydney Client Event, Shaw and Partners raised just shy of \$5,000 for White Ribbon, with the Shaw and Partners Foundation matching dollar for dollar for a total of \$10,000. White Ribbon is Australia's first male-led campaign to end domestic violence.

River to Rooftop

A great effort by our Brisbane office on Friday 9 September in the River to Rooftop charity event to raise \$5,094 for the Mater Foundation.

The Brisbane office reached the 2nd and 3rd largest individual raisers (well done Rick and Phil) and the office as a whole came 3rd, raising more money than the likes of KPMG, EY and BOQ.

A big thank you to the runners, their clients and the Shaw and Partners Foundation for matching dollar for dollar for a total of \$10,188.

Connor's Run – Melbourne

On Sunday 11 September, a group of 15 Advisers and Associates from the Shaw and Partners' Melbourne office laced up their running shoes and (for the second year in a row) set off to run just under 10km in support of the Connor Foundation. The funds raised will help support various Brain Cancer research programs. Last year the team raised \$4,500.

This year a record 3,500 participated in the run in Melbourne's Bayside area and our team raised \$6,300 with the Shaw

and Partners Foundation contributing an additional \$5,000 for a total of \$11,300.

8848 Ride Royal National Park

On Saturday 10 September, Shaw and Partners Senior Research Analyst, Peter O'Connor, cycled the height of Mt Everest in the 8848 Ride Royal National Park after a long and exhausting 13 hour ride.

Peter raised \$5,717 for the Cancer Council with each and every dollar being matched by the Shaw and Partners Foundation for a total of \$11,434.

6. **Connor's Run – Melbourne:** Shaw and Partners runners. From left: Lawrie Canty, Nigel Doodt, Mal Cameron, Connor's mum Liz Dawes, David Erskine, Maria Ryan, Alistair Ogilvie, Rachel Hirscher, Megan Williams, Natalie Ng, Chris Eldridge, Michael Holland and James Wright.
- 6a. **Connor's Run – Melbourne:** Team's captain David Erskine recovering after the race.
7. **River to Rooftop:** From left: Simon Condon, Shayne Gilbert, Tanya Bell, Rick Terpstra, Gary Vidler, Colin McKenzie, Kristofer Ridgway and Philip Toop.
8. **River to Rooftop:** High five Colin!
9. **8848 Ride Royal National Park:** Peter O'Connor reaching for the top.

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



2017 JDRF Barossa Ride to Cure Type 1 Diabetes

Following a successful ride in 2015, Senior Investment Adviser Stuart McKinnon is again assembling a Shaw and Partners team for the 2017 JDRF Barossa Ride to Cure Type 1 Diabetes.

The event is to be held in the Barossa from 5-7 May 2017. If the cause itself isn't enough incentive to get involved, the 80km route passes through South Australia's best cellar doors! There is also an option to partake in different courses: the shorter 35km route or the more elite 120km and 180km distances. Last year, the team raised just over \$15,000 for JDRF.

To get involved, contact Stuart at smckinnon@shawandpartners.com.au

10. 2015 JDRF Barossa Riders: from left: Sam Crompton, Matt Wilkinson, David Dall and Stuart McKinnon.

11. JDRF One Ride 2017 website

12. 2015 JDRF Barossa Riders: Pit stop for some wine tasting.

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Some of the charities supported by Shaw and Partners Foundation this year



Over \$250,000 donated to charities in the last 12 months



beyondblue

Shaw and Partners Melbourne Advisers hosted their clients at the Aston Martin, Rolls Royce and McLaren showroom at Southbank on Thursday 9 June.

David Smorgon OAM, Executive Chairman - Family Business and Wealth, PwC spoke around families and wealth transfer and Jeff Kennett AC, Chairman of beyondblue and former Premier of Victoria spoke about crippling social and mental issues and the importance of looking after your personal health.

A raffle on the evening generated \$5,500 for beyondblue, with every dollar raised matched by the Shaw and Partners Foundation.

Cancer Council – Biggest MT

With the culinary assistance of the ladies in the Sydney office, Heather Wilson put on yet another fantastic spread for this year's Biggest Morning Tea, raising money for the Cancer Council. This is the 16th year running that Heather has hosted a Morning Tea at Shaw.

Heather raised a total of \$4,535 for the Cancer Council. This amount included the Shaw and Partners Foundation contribution of \$2,000. A fantastic effort and huge congratulations to Heather and her sous-chefs!

Jeans for Genes

Shaw and Partners have been long term supports of the Jeans for Genes Campaign. This year staff and Advisers donned denim on Friday 5 August in a bid to raise funds for the Children's Medical Research Institute, specifically to support genetic research.

We raised \$1,808 with the Shaw and Partners Foundation matching the donations dollar for dollar to total \$3,616.

JDRF & Schools Plus

Over 850 Shaw and Partners' clients gathered at the Art Gallery of NSW on Tuesday 9 August for the annual Sydney Client Appreciation Event, which was held in conjunction with the Archibald Prize.

Guests listened to speaker David Gonski AC, Chairman of ANZ and Coca-Cola Amatil, President of the Art Gallery of NSW Trust and Author of the Gonski Report give a "behind the scenes" talk about the comings and goings leading up to the Archibald.

Over \$15,000 was raised for charity on the evening with the recipient charities being Schools Plus and Juvenile Diabetes Research Foundation.

- 13. **beyondblue.** Mal Cameron, David Smorgon and Earl Evans.
- 14. **JDRF & Schools Plus.** David Gonski AC, President of the Art Gallery of NSW Trust.
- 15. **JDRF & Schools Plus.** Access to the Archibald Prize Gallery.
- 16. **beyondblue.** Jeff Kennett AC, beyondblue's Chairman.
- 17. **Biggest Morning Tea.** Heather Wilson.



Cameron Duncan – Smith Family

On Saturday 5 March, Shaw and Partners Co-Head of Income Strategies, Cameron Duncan took part in the 2016 Smith Family Challenge; an exhilarating 100km off road traverse through the iconic Blue Mountains, West of Sydney.

With his 3 team mates and a donation of \$1,000 from the Shaw and Partners Foundation, Cam raised \$69,339, doing his bit to power the incredible work of the Smith Family in seeking to break the cycle of disadvantage.



Amanda Graham – Huntington's Disease

With the help of the Shaw and Partners Foundation, Amanda Graham raised \$1,500 for Huntington's Disease, by partaking in the inaugural Movement4Movement initiative. Huntington's disease impacts five to seven people per 100,000 worldwide and more than 1,600 people in Australia alone. It is a progressive, inherited, degenerative brain disorder that produces physical, mental and emotional changes.

The Movement4Movement initiative is a team workout, suitable for all fitness abilities. Amanda took second place in the handstand holding competition, holding her handstand for a whopping three and a half minutes!



Partnership with Cancer Council

Shaw and Partners and Cancer Council will be working together throughout the month of October to raise awareness and vital funds in support of the Pink Ribbon campaign. This initial collaboration aims to serve as a basis for a long-term partnership.

We have set an ambitious fundraising target of \$50,000. Funds will be raised through a myriad of in-house fundraising events in the lead up to and during Breast Cancer awareness month; including Friday staff drinks across all states, a 'touch of pink' casual attire day and other after-work socials.

In conjunction with this, during October, the Pink Ribbon and Cancer Council Logos will be displayed on the media room backdrop, behind all of our Sky News presenters to promote the cause and the work of the Shaw and Partners Foundation and Cancer Council.



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ShawandPartners

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Shaw and Partners supports a range of industry associations and community organisations through our corporate sponsorship program, with a particular focus on physical activity and mental wellbeing. Some of these include:

North Bondi Surf Life Saving Club

Shaw and Partners has committed to a multiyear major sponsor of the North Bondi Surf Life Saving Club.

North Bondi SLSC is one of the Surf Life Saving movement's foundation clubs, opening its doors in 1906. It boasts a long and glorious history of vigilance and service on Bondi Beach as well as an enviable track record in surf competition.

North Bondi SLSC President, Mark Cotter, commented: "We are thrilled to have joined forces with Shaw and

Partners, to help us nurture and develop our growing young member ranks. It is only through support like that provided by Shaw and Partners and, indeed, other like minded sponsors, that the true potential of many of our young members can be unlocked."

Queensland Rugby Referees Association Sponsorship

On Wednesday 10 August 2016, Shaw and Partners signed a sponsorship agreement with the Queensland Rugby Referees Association (QRRRA). The sponsorship is for a three year duration commencing in the 2017 season.

More than 4,000 games per year are refereed by the QRRRA; including Brisbane Senior Grade Games (Friday and Saturday night including Finals), Junior Games (Saturday and Sunday games), school boy games (Saturday), Underage Carnivals, Corporate 10's and 7's tournaments.

The agreement will see the Shaw and Partners logo appear on the front and back of the new referee's uniform come

the 2017 season. Be sure to keep an eye out for Shaw and Partners from the sidelines!

Australian Ocean Racing Series

Shaw and Partners is the new main sponsor of this year Australian Ocean Racing Series (AORS), a national ocean racing series attracting competitors across a number of ocean racing disciplines including Ocean skis, Surf skis, Stand Up Paddleboards, Prone Paddleboards and Outrigger Canoes.

The series will travel around the country to Australia's most popular beaches showcasing men and women competing in a variety of categories in the only ocean racing series of its kind.

18. North Bondi Surf Life Saving Club:
Shaw and Partners Nippers!

19. Queensland Rugby Referees Association Sponsorship: Shaw and Partners new proud sponsor

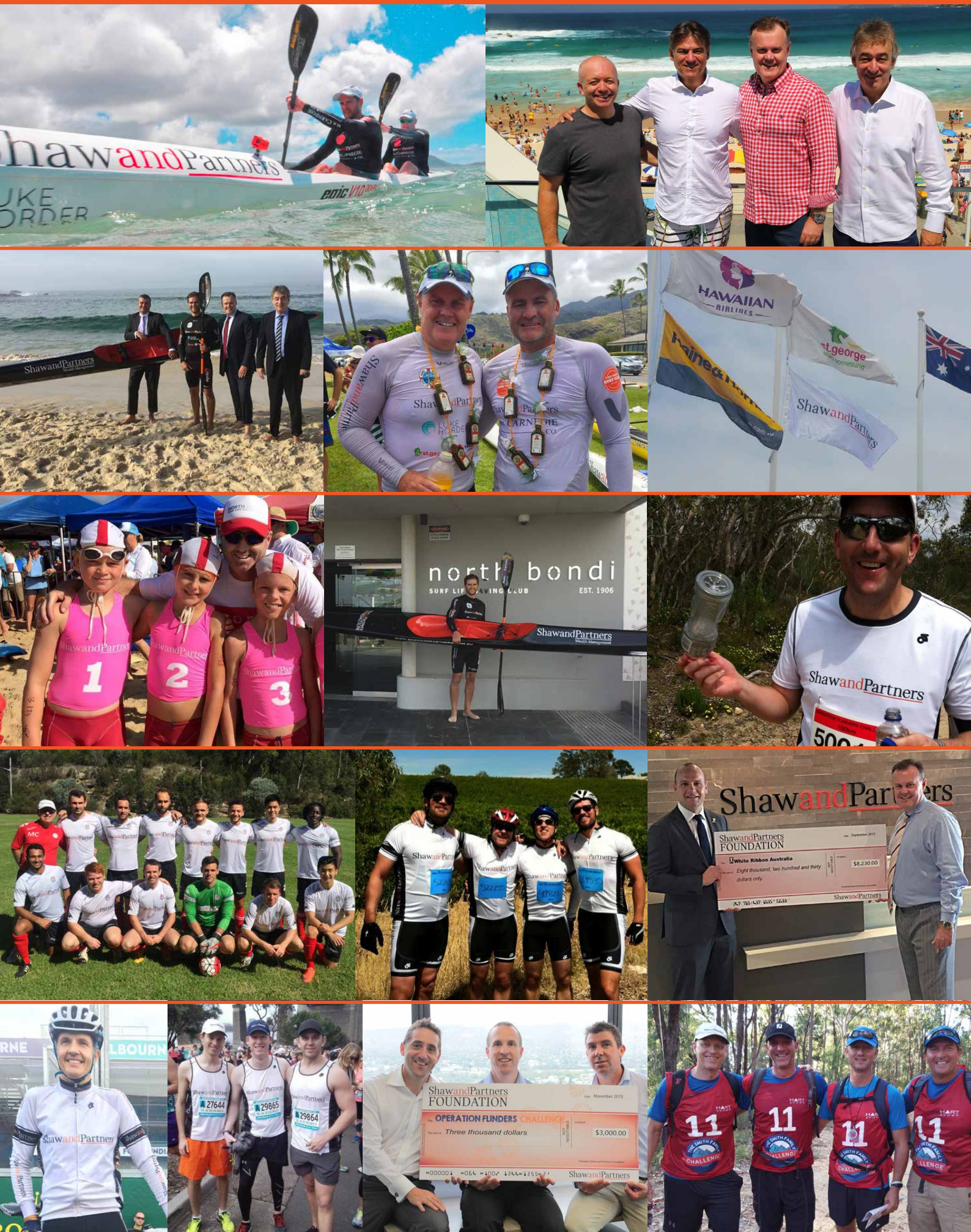
20. North Bondi Surf Life Saving Club

21. North Bondi Surf Life Saving Club:
Paul Masi and Allan Zion

22. Australian Ocean Racing Series (AORS)

First year of the Foundation

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