

# Impact Report 2021-2022

**Be**  
BlueRock  
FOUNDATION





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# Letter From the Board

Like many of the best things in life, the idea for the Be BlueRock Foundation was seeded by an inspiring conversation over a nice meal. BlueRock is a business founded on a principle of doing good things with good people. So, in 2019, Managing Director of Private Wealth, Adam Morse, and Philanthropy Executive, Tabitha Lovett, got to talking about how we extend this approach, which has led to fast growth for BlueRock and great success for our business owner clients, to have a broader impact on families and communities? And then, more specifically, how do we expand on the wealth advisory services we currently offer our clients to create an accessible and holistic approach to philanthropy, investments and business?

The answer, of course, was the establishment of the Be BlueRock Foundation, a public ancillary fund that offers individuals and organisations a simple, cost-effective and tax-effective way to establish their own sub-fund with the support of a broader foundation, so they can distribute funds to charities of their choice over time.

Once the idea was formalised, we set to work. We established the Board of Trustees and Taskforce to govern and guide the set-up of the foundation and to maintain engagement, impact and performance over time. We surveyed BlueRock staff to hone the causes the foundation would support, so we could have a deep impact at a grass-roots level on issues that matter most to our community. And we started on the weighty challenge of setting up the processes, systems and partnerships that would allow the foundation to meet its goals.

As a result of the pandemic, the last year's achievements and activities have really been the culmination of two years. After two cancellations, we were finally able to officially launch the Be BlueRock Foundation at an amazing event in Melbourne's CBD on 7 June 2022. Attended by over 200 people, the event showcased our foundation, the people behind the scenes, and the charities we support.

Over FY21, we created three sub-funds for BlueRock clients with a total of \$500k funds under management.



We also raised an additional \$76,695 in donations and contributed over 1,000 hours of pro bono time to the foundation and charity organisations in the three cause areas we identified: Conservation & the Environment, Youth Mental Health, and Financial Literacy for Vulnerable Cohorts.

This wouldn't have been possible without the financial and strategic support of the BlueRock Board, and our passionate and dedicated BlueRockers who are always excited and willing to give their time, money and sometimes leg power to contribute to the foundation's fundraising efforts.

We also thank our clients who trust us to partner with them on this big adventure, and to work with us to bring a greater sense of purpose to the wealth we are so fortunate to earn, grow and share.

## The Board of Trustees

# Impact By Numbers

Total Pro-Bono Hours  
**1,000**



Accounting  
**300**



Marketing  
**130**



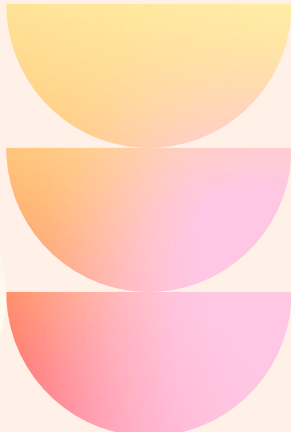
Trustee Group  
approx.  
**140**



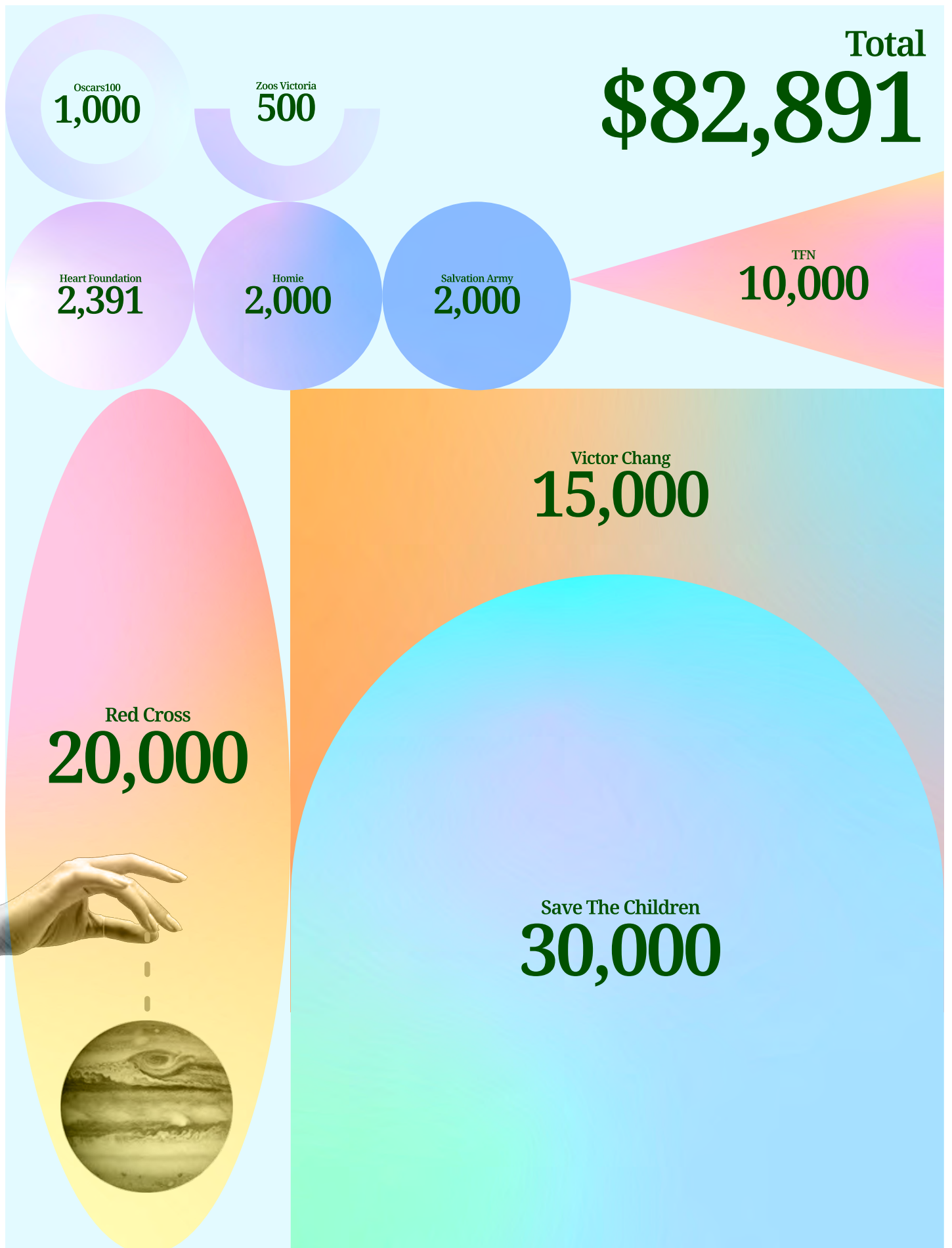
Taskforce  
approx.  
**110**



Administration  
approx.  
**150**



# Grants Given



# Total Donations Received



Donations Received  
**\$76,695**

# Number of Events Held

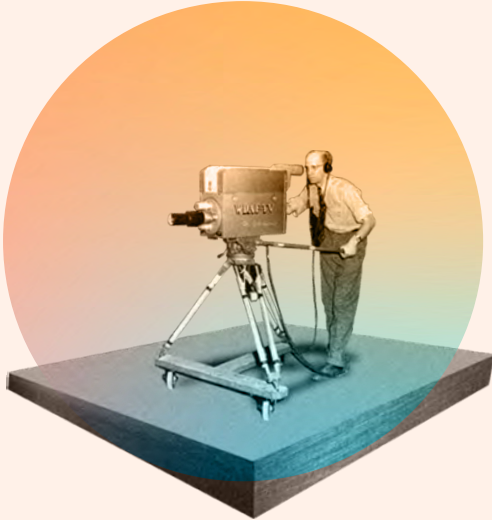
The Funding Network Event



Total  
**3**



Be BlueRock Foundation Launch



Charity Golf Day

# About the Be BlueRock Foundation







## What is the Be BlueRock Foundation?

The Be BlueRock Foundation is a Public Ancillary Fund, which is a type of charitable trust in which an individual, family, organisation or company can establish a fund to put aside money for long-term charitable purposes. It allows people to enjoy the benefits of a public foundation without the responsibilities of being a trustee.

## Why Did We Establish the Be BlueRock Foundation?

The Be BlueRock Foundation creates another opportunity for BlueRock to give back to our community.

The foundation allows our clients and staff to engage in meaningful conversations about how we can give back and strengthen our communities, protect our environment and help those in need.

The philanthropic endeavours of our professional services peers often start with a commercial focus. BlueRock aims to disrupt this business model by maintaining a focus on impact as our core and primary objective.

Importantly, the Public Ancillary Fund structure creates the opportunity for our clients to engage with a much smaller financial commitment; therefore, broadening the scope to connect, educate and impact a much wider audience.





## Our Purpose

To bring a greater sense of purpose to wealth generation for our staff, clients and community.

## Our Vision

Inspiring philanthropy to build strong communities.

## Our Values

We are passionate and relentless.

We aim to inspire.

We make giving accessible.

We help the helpers.



# Cause Areas





## Financial Literacy for Vulnerable Cohorts

Recent research has found that approximately 45% of Australian adults are considered to be financially literate. There are also significant gender gaps with only 48% of women demonstrating basic financial literacy compared to 63% of men.

Given BlueRock's suite of services, we are particularly passionate about increasing financial literacy within our community with a focus on vulnerable cohorts. We operate on the premise that the best way to address economic disadvantage is to help individuals and families break the cycle of poverty towards financial independence, and to arm them with the skills they need to achieve financial security and self-sufficiency.

The Be BlueRock Foundation partners with local not-for-profit organisations committed to building the financial capability of all Australians within a fair financial system. We work with local agencies to assist vulnerable individuals and families, providing relief grants and financial literacy training.



## Conservation, Animals and the Environment

One of the greatest challenges of our time is arguably climate change. Every person on Earth will be affected but the poor and vulnerable will be hit first and worst. In Australia, we can already see the results of climate change in our landscape: coral bleaching on the Great Barrier Reef and the bushfires devastating our forests and country.

Our aim is to protect the environment and build a more sustainable world for future generations by supporting grass roots projects that are tackling the issues that impact on our environment to potentially halt and reverse climate change.

## Youth Mental Health

Suicide is the leading cause of death among young Australians. It accounts for a staggering one-third of deaths in people aged under 25 – more than road accidents – and many more live with suicidal feelings. Mental ill health extends beyond the individuals directly suffering depression and anxiety to their families, friends and broader networks.

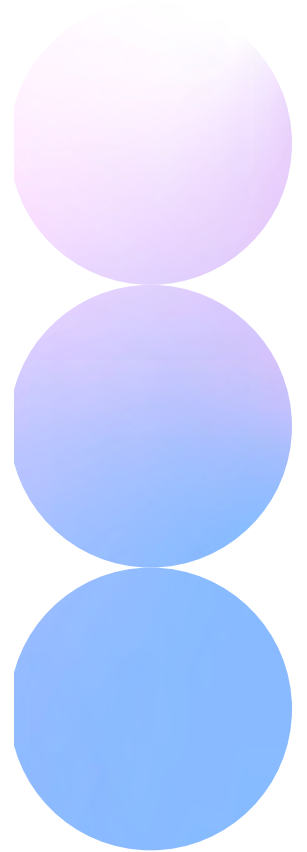
The Be BlueRock Foundation seeks to ensure that young people have access to the education and support they need to navigate mental health challenges and build resilience for a strong future.

Through our corporate giving and fundraisers, BlueRock supports a number of organisations, which in turn support young people and families touched by mental ill health.



# Board of Trustees

The Be BlueRock Foundation is governed by an elected Board of Trustees with diverse backgrounds and professional expertise across philanthropy, business advisory, investment, accounting, marketing and law.





## Adam Morse

Managing Director of Private Wealth at BlueRock

Adam, a Certified Financial Planner®, commenced his career in 2005 with a full-service advisory practice in Melbourne, before founding BlueRock Private Wealth in 2014 to help expand BlueRock's holistic and integrated professional services offering for business owners and complex family clients.

Adam is a founding trustee of the Be BlueRock Foundation and is passionate about driving the philanthropic objectives and activities of BlueRock, and making Philanthropy accessible for our client community



## Lisa Marshall

Director in Accounting at BlueRock

Lisa joined BlueRock in 2010 as an experienced accountant and is an expert in working with privately owned businesses to achieve growth and success.

As a founding trustee of the Be BlueRock Foundation, Lisa is particularly passionate about creating a culture of giving back within our BlueRock community. Lisa is often involved in the Be BlueRock Foundation's charity events and is a champion for the foundation within her teams.



## Marco Saccotelli

Director in Law at BlueRock

Marco joined BlueRock in 2010 as an experienced commercial lawyer and he currently has 23 years of experience in taxation, superannuation, commercial and corporate law, and estate and business succession planning.

After many years of advising on the legal aspects of establishing and running charities, Marco is excited to be a trustee of the Be BlueRock Foundation. In addition to the pro bono time invested as a trustee, Marco assists other charities via pro bono legal services. He enjoys seeing our staff and clients get behind our three main charity areas of financial literacy, youth mental health and the environment.



## Jo Stanlake

Director of Brand, Sales & Marketing at BlueRock

Jo has over 20 years of brand and marketing experience across the commercial, education and community sectors, with many years spent delivering communications strategies within youth and mental health organisations.

Having moved from digital client services at BlueRock Digital to head up BlueRock's brand and marketing team in 2020, Jo is happy to extend her strategic focus to the promotion and impact of the Be BlueRock Foundation as a founding trustee. She is passionate about giving back and bringing a greater purpose to business and wealth generation.

## Jamie King

Managing Director of Finance at BlueRock



Jamie's extensive background in commercial banking and mortgage broking helps him advise BlueRock clients big and small to put the right debt structures in place at the right rate.

Jamie was excited to get involved as a trustee of the Be BlueRock Foundation. Aside from the obvious benefits to our clients and community, Jamie is inspired to see how it is increasing overall feelings of happiness and morale among BlueRock employees. Being socially responsible and giving back to society while expecting nothing in return is a big part of the BlueRock culture.



## Kaitlin Beattie

Philanthropy Manager

Before joining BlueRock as a Wealth Associate, Kaitlin worked as a legal assistant in the Superannuation and Insurance department of a major law firm.

After her stint with the BlueRock Private Wealth team, Kaitlin moved into the role of Philanthropy Manager. She now takes the lead on all things Be BlueRock Foundation, working to build strong relationships with charities and corporate partners, and helping BlueRock clients to create a lasting legacy through effective giving strategies.

With a background in legal studies, politics and youth work, Kaitlin knows the value of building strong relationships.

## Tabitha Lovett

Philanthropy Executive



Tabitha sits on the board of Philanthropy Australia and prior to her role as CEO of the Besen Family Foundation, Tabitha managed a portfolio of more than 450 charitable trusts with combined funds under management of \$1.8 billion, distributing over \$70 million annually. She also managed the investment relationships with more than 30 not-for-profits with combined investments of \$300 million+ at Equity Trustees.

Tabitha is delighted to be a trustee of the Be BlueRock Foundation. She is passionate about the role that philanthropy plays in the community in tackling social issues that require innovative, compassionate, and sustainable solutions. Before moving into the philanthropy sector in 2008, Tabitha worked as a social justice lawyer at Justice Connect. That experience and exposure to the causes and contributors to inequality, hardship and disadvantage underpin her approach to the practice of philanthropy.



# Charitable Taskforce

Rosie Mudge, Holly Bowman,  
Aidan Long, Regant Chet &  
Alex Hollick

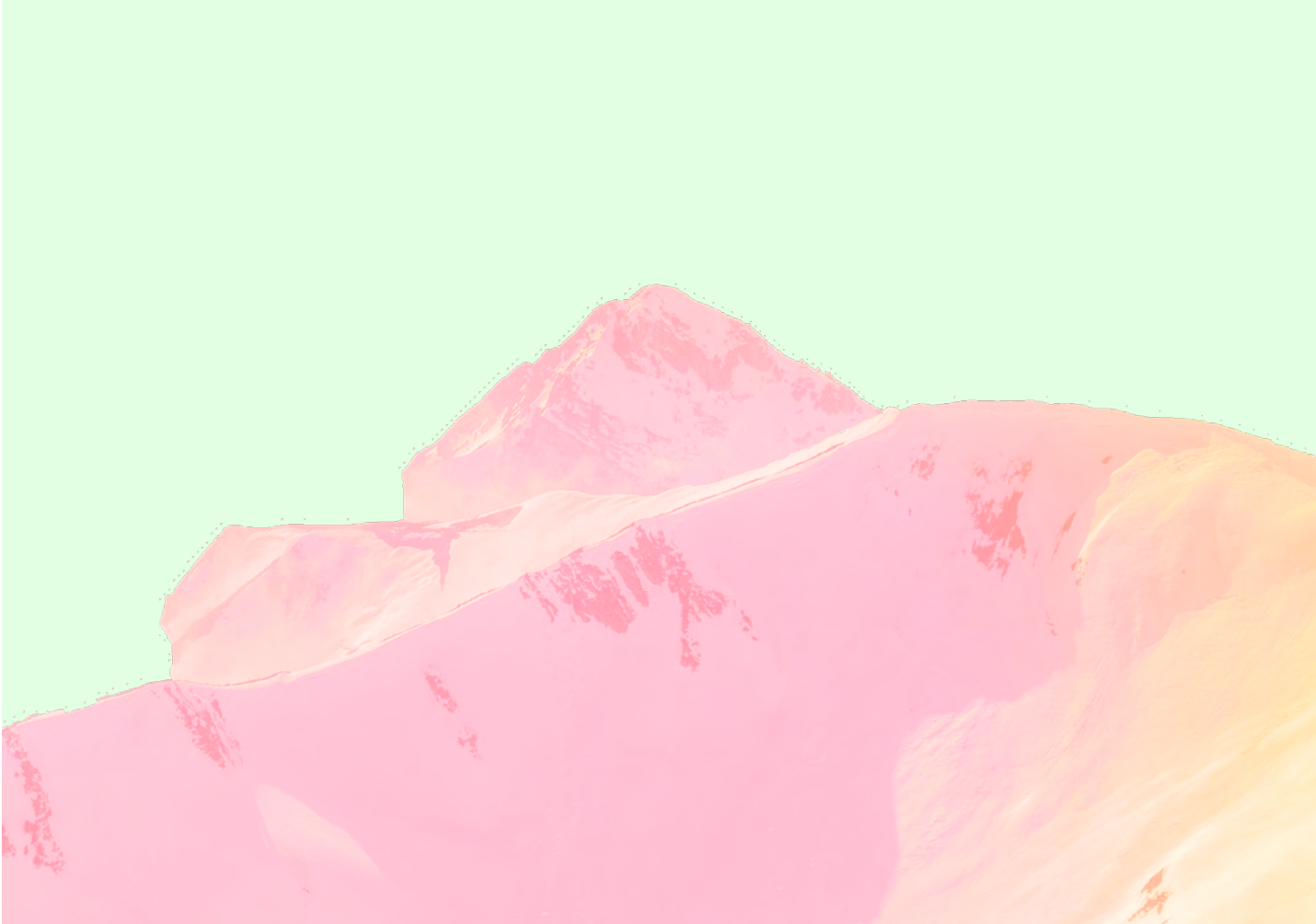
The Be BlueRock Foundation Taskforce is made up of BlueRock employees with a community spirit who are keen to help our foundation grow to have a lasting social impact.

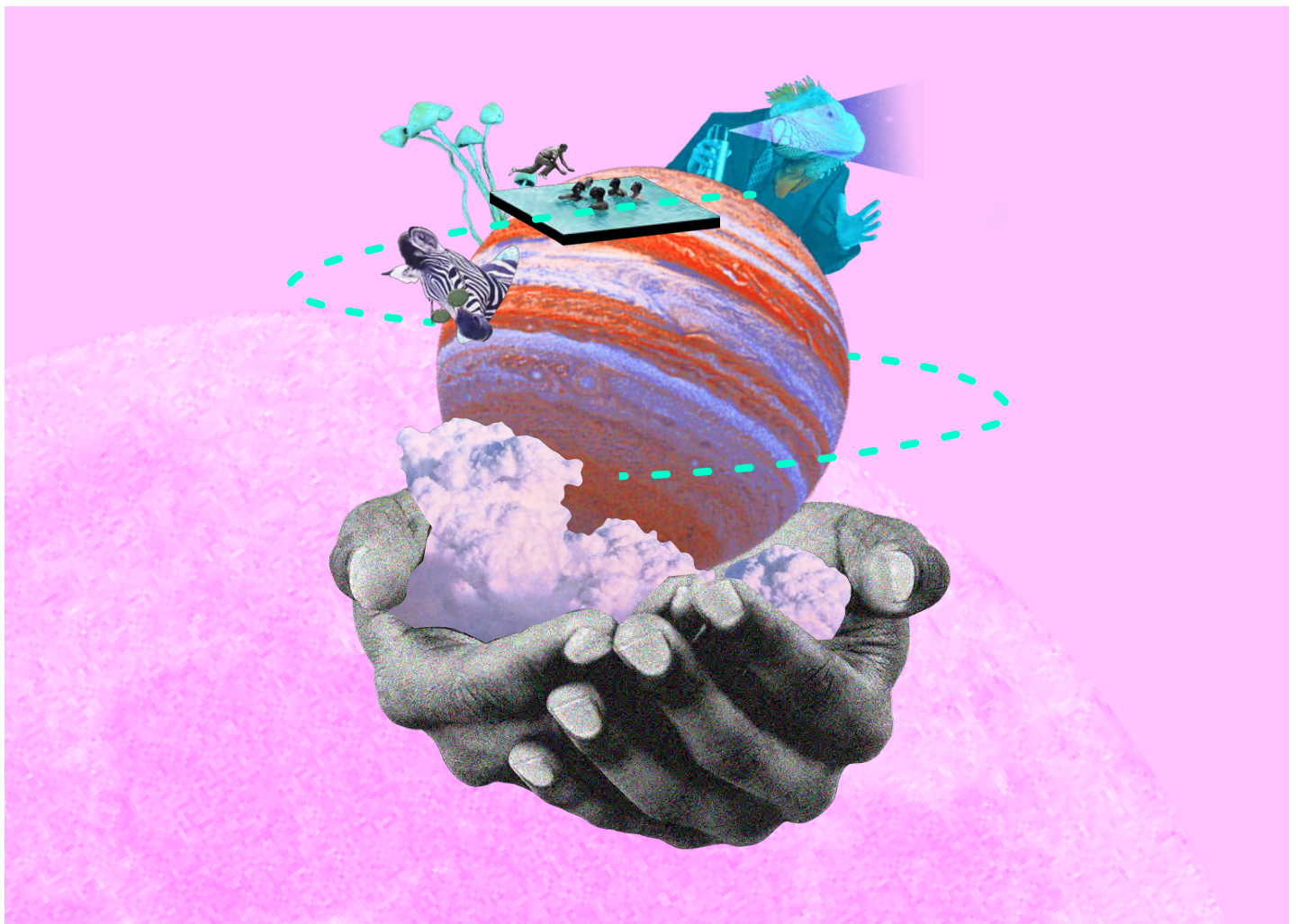
The taskforce meets regularly to perform due diligence on the charities we support and to communicate with those charities on an ongoing basis. They also drive our staff engagement in the foundation by coordinating volunteer opportunities, pro bono work and events.





# Key Partners





ODONATA

<https://www.odonata.org.au/>

It is Odonata's mission to empower and enable all Australians to play important roles in saving our wildlife and reversing the impacts of climate change. Odonata develops innovative ways for everyone to get involved in taking action for nature. Addressing multifaceted challenges facing our wildlife with new solutions and collaborations for biodiversity resilience.

Odonata does work in five key areas:

- Sanctuaries: Odonata runs a network of threatened species sanctuaries across South-East Australia.
- Corridors: Odonata creates wildlife corridors connecting sanctuaries and species to each other.
- Animals: Odonata works with partners to help the protection of numerous species through habitat restoration, creation of sanctuaries, building nature corridors and many other initiatives.

- Research: Odonata has a scientific advisory group oversees research across all Odonata sanctuaries, which in turn informs and guides their work.
- Business: Odonata works with entrepreneurs, NGOs, regenerative farmers and landowners to reconnect people to our natural places and engage them in conservation and species recovery.

#### Why we have partnered with them:

Odonata has been a part of the BlueRock community for some time as a client and when the Be BlueRock Foundation launched, we couldn't think of a better organisation to partner with.

They are innovative, entrepreneurial and forward thinking. Their passion for conservation and the environment is second to none and we are very excited to continue to support them through their Wild Idea Incubator Program.



<https://www.lifeedvic.org.au/>

Life Smart Kids mission is to change health behaviours to enable children to thrive in their lives. They achieve this by giving kids the smarts to deal with the hard stuff.

To help change behaviours, they:

- Amplify student voice & agency
- Teach social emotional learning
- Use high impact teaching strategies
- Use evaluation methodology & evidence
- Invest into our facilitators

#### Why we have partnered with them:

Healthy Harold was a household name for many of us growing up in Victoria. They have been a trusted brand encouraging our children to translate their learning into action in a number of different areas.

The program that we are most passionate about is their Core Program which has modules in health and wellbeing and respectful relationships, focusing on a preventative approach to mental health.

Life Education Victoria was hit hard by the pandemic and we are providing support to get them back on their feet.



<https://oceanmind.org.au/>

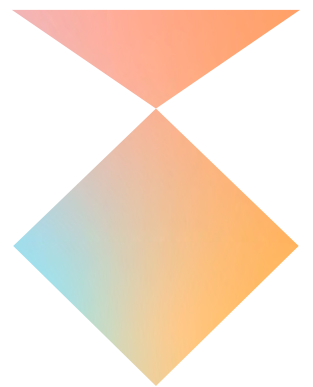
Ocean Mind is a charity that provides therapeutic surf programs for young people who are experiencing mental health challenges, social isolation and disabilities. Using a simple mix of Surfing, Mentoring and Fun they create a therapeutic environment for young people to challenge themselves, learn new skills and flourish.

**Why we have partnered with them:**

We have been inspired by the work being done by Ocean Mind at a grassroots level on the Surf Coast. We love their approach to improving youth mental health through physical activity and their emphasis on having fun resonated with us the most. We look forward to continuing to support Ocean Mind as they impact the lives of Victoria's youth.



# Grants





## The Heart Foundation

<https://www.heartfoundation.org.au/>

Their vision: Towards an Australia free of heart disease.

Their mission: To reduce heart disease and improve the heart health and quality of life of all Australians through our work in Risk Reduction, Support, Care and Research.

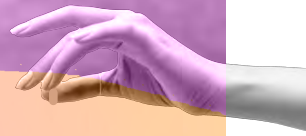
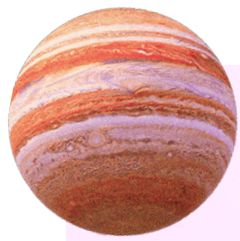
### Why we have partnered with them:

The Heart Foundation is an organisation we feel strongly about supporting as a firm in memory of our friend and colleague, Dario Bertini.

Dario worked at BlueRock between 2018 and 2020 and was a much-loved and valued part of the BlueRock Private Wealth team. In his role as a wealth associate, Dario had an unwavering focus on client service and the implementation of sound financial advice, and was admired by clients for his attentive

service and ability to communicate with people from all walks of life. Dario was also known for his passion for eclectic music, his quirky fashion sense, and his great love of running. Unfortunately, a fatal heart condition killed Dario in July 2020, during the pandemic, which was a terrible time for Dario's family and friends, as well as his BlueRock family.

We wanted to commemorate Dario and continue his memory, as well as raise funds for the Heart Foundation so they can continue their important research into conditions like Dario's, so that others might be saved.



## HoMie

<https://homie.com.au/>

HoMie is a not-for-profit supporting young people affected by homelessness or hardship. At HoMie, we believe in young people and our aim is to empower young people to thrive.

100% of their profits go towards achieving their mission:

To support young people affected by homelessness or hardship to equip them with the skills, confidence, and experiences to be more work-ready and better prepared for their future.

### Why we provided a grant:

HoMie was selected by BlueRockers to be the recipient of our Christmas Giving donation. Homelessness is such an important issue effecting so many young people and we love the work they do.



## Youth Live4Life

<https://www.live4life.org.au/>

Youth Live4Life is a health promotion charity, using the Live4Life model to support rural and regional communities and their young people.

Live4Life is the only mental health education and youth suicide prevention model designed specifically for rural and regional communities.

Live4Life communities deliver Teen and accredited Youth Mental Health First Aid training in schools and the wider community, create local partnerships to lead conversations about mental health that reduce stigma, and promote young leaders as mental health ambassadors.

### Why we provided a donation:

We supported Youth Live4Life through the Funding Network. The donation we provided was to support the expansion of their amazing programs into new communities around Victoria.



## Oscars100

<http://www.hut2hut.oscars100.com.au/about/>

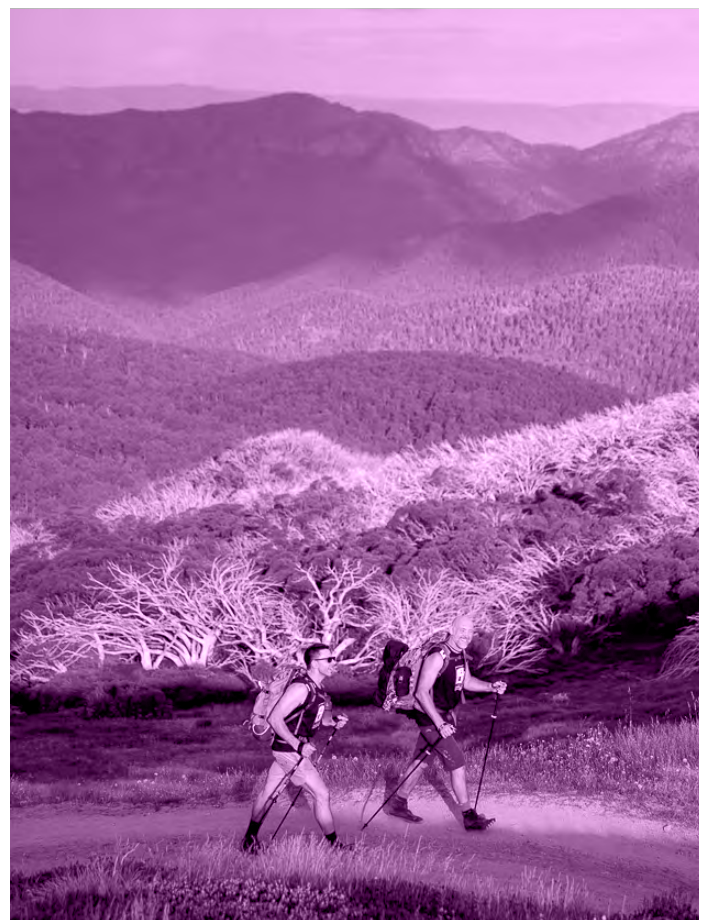
Oscars100 is an organisation committed to improving the lives of children living with Autism.

Oscars100 raises funds to supply state of the art technology used to help deliver early intervention programs. This includes items such as iPads, Tablets, PCs, Interactive Whiteboards and smart TVs.

Since its creation in 2013 Oscars100 has provided over \$50,000 in donations to organisations such as Amaze (Autism Victoria) and Irabina.

### Why we fundraised for them:

Oscars100 is a part of our wider BlueRock community with two of our BlueRockers running The Archie 50km trail to raise funds for this fantastic organisation. We wanted to show our support for our community by contributing to this cause.





# Key Events





FUNDING NETWORK

# The Funding Network Event

<https://www.thefundingnetwork.com.au/>

Since 2013, The Funding Network (TFN) has been bringing people together to find, fund and support grassroots social change programs that directly help people in need.

Through their interactive live crowdfunding events, they connect grassroots non-profits to people and organisations interested in investing their money, time and talent to drive social change.

## Why we have partnered with them for their event in May 2021:

We could not turn down the opportunity to partner with The Funding Network for our first ever Be BlueRock Foundation sponsored event. It was one of the few times during covid that we could host an in-person event and it was a privilege to provide match funding to the organisations who presented on the night.



# Charity Golf Day

In May 2022 we hosted a Charity Golf Day at Heidelberg Golf Course, inviting many of our clients to play and raise money for our charity partner, Odonata. We raised \$8k over the course of the day, through raffle tickets, an auction, pro golfer assistance during the game, and sponsorship by some of our major corporate clients.



# Be BlueRock Foundation Launch



We finally held our official Be BlueRock Foundation Launch Party on Tuesday 7 June 2022. With 250 people registered to attend and approximately 200 in attendance in person, we had a fantastic night among clients, colleagues, friends and family. We were incredibly grateful to be joined by our amazing panellists: Jack Riewoldt (Richmond Football Club), Tabitha Lovett (CEO of the Besen Family Foundation) and Craig Ferguson (Antipodean and BlueRock Investment Committee) who discussed all things philanthropy and the important role it plays in each of their lives.





## Charitable Fund Accounts

Over the past 12 months, we have been working closely with clients, both families and businesses, to establish Charitable Fund Accounts with the Be BlueRock Foundation and to develop bespoke giving strategies that reflect their values and interests.

We love leveraging the blueprint created by the Be BlueRock Foundation to help our clients implement meaningful and impactful giving solutions within their families and businesses.

Some cause areas that our Charitable Fund Accounts support:

- Ukraine Crisis Appeals
- Climate and the Environment
- First Nations Issues
- Public Policy Reform
- Medical Research
- Youth Welfare and Development
- Education
- Housing Affordability and Homelessness

## What We Want to Achieve

We want to make philanthropy accessible, enabling every Australian to have a giving purpose and platform.

In the next 12 months, we aim to:

1. Set up another 10 Charitable Fund Accounts
2. Increase the number of staff participating in the salary sacrifice program
3. Empower every staff member of BlueRock to participate in at least one day of pro bono work
4. Develop a financial literacy program that can be implemented through partnering charities.



 @be\_bluerock\_foundation

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