

2022-2023

# Impact Report

**Be**  
BlueRock  
FOUNDATION

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<b>FY23 HIGHLIGHTS</b>
✓ MET OUR CHARITY DISTRIBUTIONS GOAL
✓ MET OUR DONATIONS RECEIVED GOAL
✓ MET OUR BLUEROCK PAYROLL GIVING GOAL
✓ EXCEEDED OUR FUNDS UNDER MANAGEMENT GOAL
✓ INCREASED OUR TIME & TALENT GIVING

The Be BlueRock Foundation acknowledges Aboriginal and Torres Strait Islander peoples as the first inhabitants of the land now referred to as Australia and that sovereignty was never ceded.

We acknowledge and pay respects to the hundreds of First Nations and Traditional Custodians of the land and waters encompassing where we live, work and provide our services. We recognise and celebrate their spiritual and ongoing connection to culture and Country. We pay our respects to all Elders past and present.

The Be BlueRock Foundation is a not-for-profit charity foundation operating under the Public Ancillary Fund (PuAF) guidelines, and holds tax-deductible DGR-2 status. We are proud to display the Registered Charity Tick to highlight our charitable status through the Australian Charities and Not-for-profits Commission (ACNC) Charity Register.



# About the Be BlueRock Foundation

## VISION

Inspiring philanthropy to build strong communities.



## MISSION

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



## VALUES

- WE ARE PASSIONATE AND RELENTLESS
- WE AIM TO INSPIRE
- WE MAKE GIVING ACCESSIBLE
- WE HELP THE HELPERS



## Our Story



**2019**

An inspiring conversation

**2020**

Foundation established

**2022**

Foundation launched

**2023+**

Foundation growing

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 BlueRock Private Wealth, Adam Morse, and Philanthropy Executive, Tabitha Lovett, got to talking about how we extend this approach 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 their chosen charities over time.

We established the Board of Trustees and Taskforce sub-committee to govern and guide the set-up of the foundation and to maintain engagement, impact and performance over time. We surveyed BlueRock staff to narrow down the causes the foundation would support and developed our Philanthropy Consulting service for our clients to set up their own charity giving vehicles. And then we were off on our impact adventure...



# Message From the Board



We are filled with pride, joy and inspiration as we look back on the highlights of FY23. The year brought a number of new partners, events and clients to the Be BlueRock Foundation, engaging people in a meaningful way of life. We are pleased to reflect at this time that we are truly living our purpose of bringing meaning to wealth generation for our clients, staff and community. We aim to inspire and are making giving accessible so that our clients don't have the administrative burden of being a trustee of a charitable fund, but can focus their energies with their family or business community on the fun stuff – the giving and impact.

We had a positive experience working with our clients on their giving strategies in FY23 – from families having multi-generational conversations about giving around the dinner table to business owners exploring what it means to offer a meaningful workplace and run a successful business.

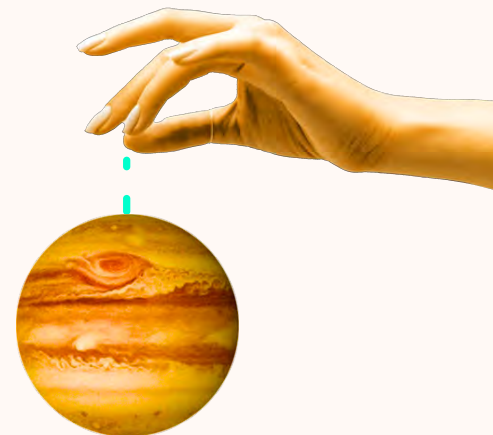
We hosted a number of exciting events with philanthropic partners, including The Funding Network and Life Ed Vic, and we also held our inaugural Foundation Gala Dinner. We are particularly proud of running our first major gala event with our community, which showcased a fabulous panel of charity partners hosted by our Philanthropy Executive, Tabitha Lovett. Together, we were able to raise \$47,000 on the night, and are pleased to prove this concept as an ongoing fundraising initiative for the foundation.

We wanted to take a moment to express our deepest gratitude to our regular donors, our staff giving through BlueRock's payroll salary sacrifice initiative, our community coming to the table on our calls for donation action, and our people giving their time through volunteering and pro bono work to many good causes. We raised \$314,000 in donations and gave over 1,700 hours in time and talent. We distributed almost \$70,000 to charities in this reporting period, and were able to make great headway in the growth of the fund's impact portfolio.

This new financial year brings some change for the Be BlueRock Foundation. We wish to thank and farewell our founding director Adam Morse and inaugural Philanthropy Manager Kaitlin Beattie. We believe the foundations of our foundation are well and truly set and from here, we can build momentum and inspire philanthropy to build stronger communities. We welcome new members Jamie King and Lyle Meaney, and together are looking forward to this new chapter of growth in the year ahead.

With thanks,

Jo Stanlake on behalf of the Be BlueRock Foundation Board of Trustees





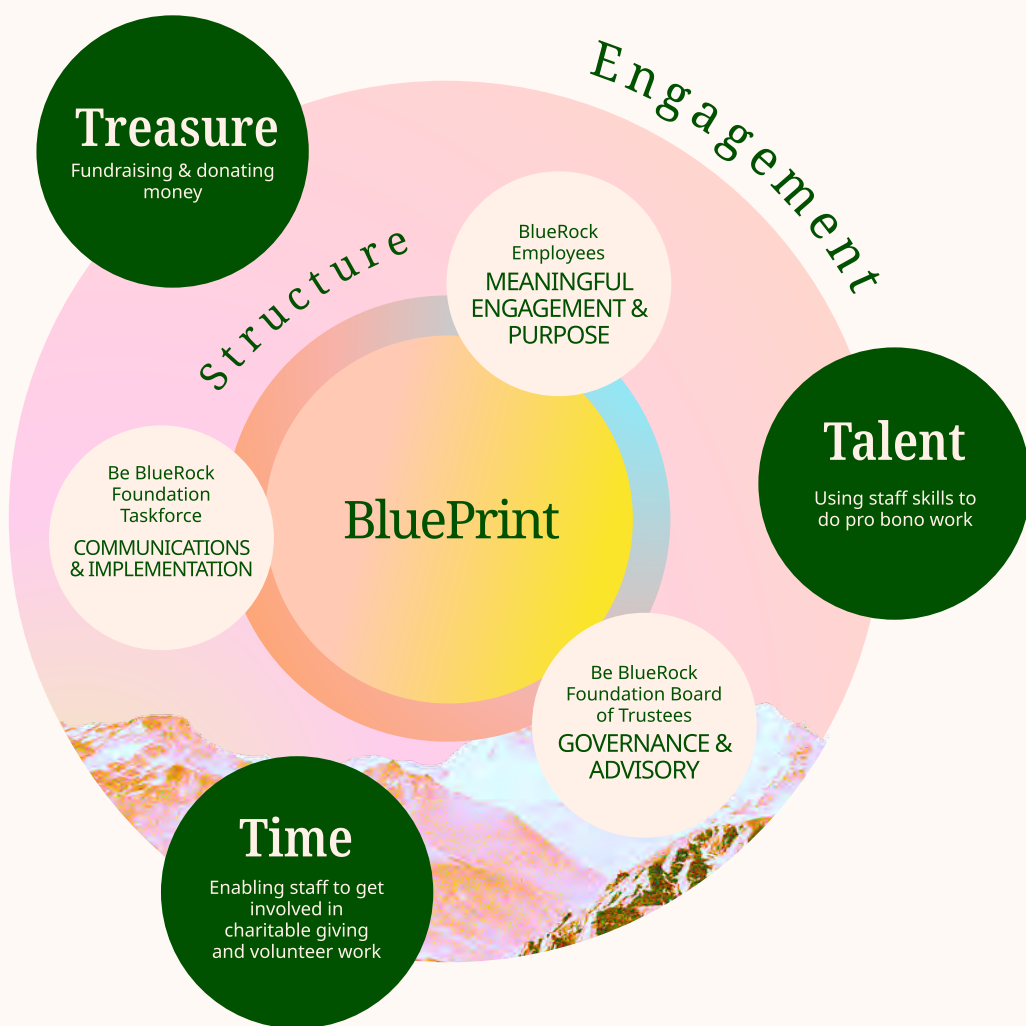
# Time, Talent & Treasure

Below is the **BlueRock Giving Blueprint - our approach to giving**. The Be BlueRock Foundation's giving strategy is centered on the donation of time, talent and treasure, ensuring maximum impact in education, the environment, and community development. The Board of Trustees provides governance and strategic advisory support, while the Taskforce is responsible for communications and implementation, ensuring efficient utilisation of resources.



BlueRock employees, or "BlueRockers", are provided with **meaningful opportunities for engagement and purpose** through this giving strategy, enabling them to get involved in charitable giving and volunteer work, or use their unique talents to do pro bono work and fundraising activities. These collaborative efforts enable the Be BlueRock Foundation to create positive and lasting change.

BlueRock is committed to having a strong community impact by asking every employee to allocate one day of paid volunteer leave and one day of pro bono services per year to charities. This is supported by a company policy that outlines the details of the initiative, and with support from the leadership team and direct line managers. Outside of this charity giving, BlueRockers are also involved in diversity, equity, belonging, inclusion, carbon neutral and B Corporation initiatives.



# Time, Talent & Treasure

## Time

Volunteering activities include company-wide initiatives like organising a charity speaker at a morning tea or lunch, participating in a fun run or helping a charity with their time...many hands make light work.

In June 2023, BlueRock's Wealth team enjoyed a team building day with purpose in Mount Martha, volunteering in the area of food insecurity with Food for Change. Food For Change grows fresh nutritious food on their farms, rescues food, and donates meals to food relief organisations who are feeding Australians facing adversity.

FOOD FOR CHANGE

JUNE 2023



ODONATA HATCH PROGRAM

JUNE 2023



## Talent

Pro bono services allow us to use our skills, knowledge and talent for charities.

BlueRock partnered with **Odonata's HATCH Accelerator Program** to help 'ecopreneurs' develop their wild ideas for nature-based businesses. A team of 5 BlueRockers provided the HATCH participants with a workshop of insightful discussions and expert guidance on accounting and tax matters, empowering them in their entrepreneurial endeavours.

BlueRock is developing a financial literacy program for **Mackillop Family Services** targeted at young people exiting foster care aged 15-18 years. There's an identified gap in Australia's education system when it comes to money basics, getting paid, building savings and cash flow management, plus understanding tax, superannuation, investment and loans.

BlueRock's Digital team helped **Life Ed Victoria** with their social media strategy to enable them to reach a greater audience with the work they're doing, to help give kids the smarts to deal with the hard stuff.

A number of BlueRockers from Accounting, Insurance and Digital also used their skills for good helping **Ocean Mind** with their finances, insurance review and website redevelopment.

LIFE ED VIC SOCIAL MEDIA STRATEGY

JAN 2023



**7% increase from FY22 to FY23: 1000 to 1727 hours**

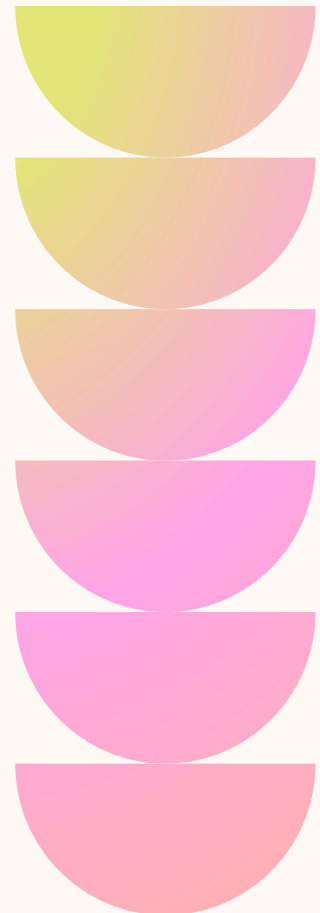
# Time, Talent & Treasure



## Treasure

As part of our BlueRock Giving Blueprint, in addition to giving our time and talent, we also give to our charity partners through the use of our office spaces as well as grants. We grant funds from the Be BlueRock Foundation and facilitate our philanthropy sub-fund clients' annual charity distributions.

A special thank you to all BlueRock employees who salary sacrifice from their regular payroll to donate to the Be BlueRock Foundation. BlueRockers are well above the market average with our 25% participation in payroll giving.



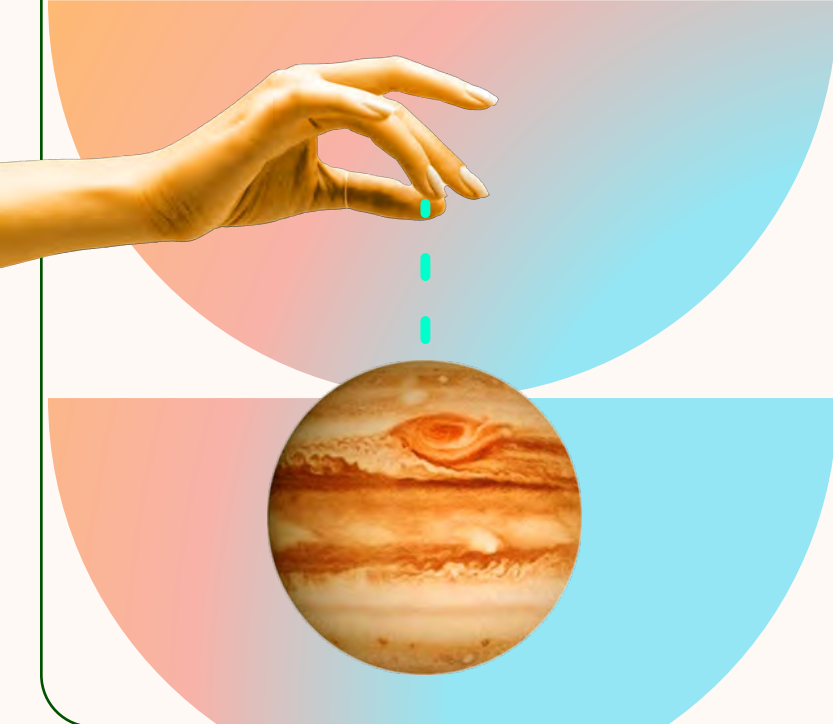
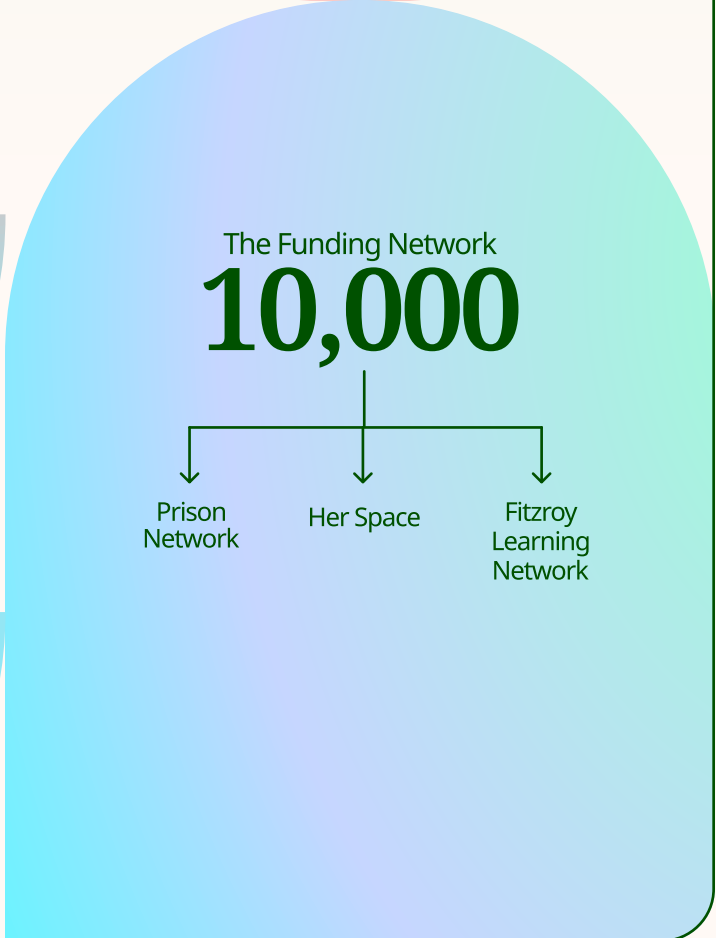
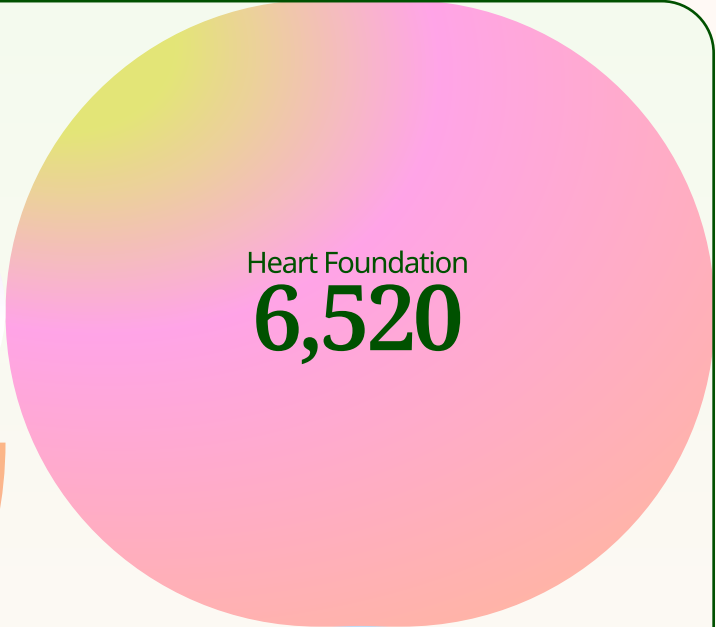


# Our Impact

**Treasure** FY22: \$17,391  
FY23: \$29,520 

BE BLUEROCK FOUNDATION  
GRANTS DISTRIBUTED

Total  
**\$29,520**



NOTE: OUR TOTAL GIVING MAY BE UNDERREPORTED AS WE HAVEN'T COUNTED DISCOUNTED BLUEROCK SERVICES FOR NOT-FOR-PROFITS OR LOW BONO SERVICES AND WE HAVEN'T TRACKED GIVING AT CHARITY EVENTS.

# Our Impact

**Treasure** FY22: \$65,500  
FY23: \$37,600

GRANTS DISTRIBUTED BY  
PHILANTHROPY SUBFUND CLIENTS

Total  
**\$37,600**

Bridge It  
**\$17,000**



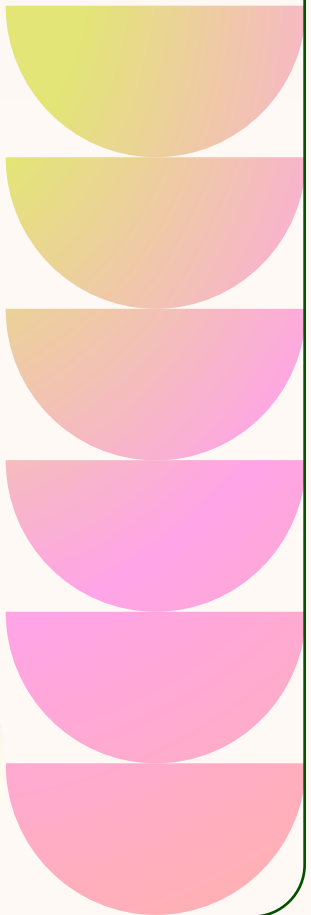
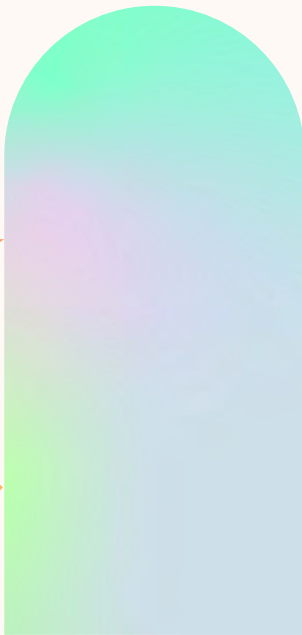
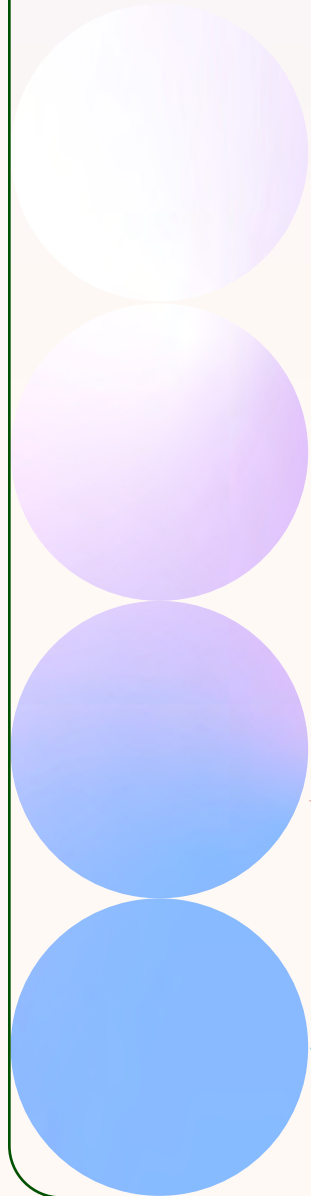
Foundation for  
Regional Rural  
Network  
**\$10,000**

Rally4Ever  
**\$5,000**

The Funding  
Network  
**\$3,600**

BridgeIt  
The Beautiful Bunch

The Venny  
**\$2,000**



# Our Structured Giving

We would like to thank all donors who have contributed this year and in past years. It is through your generosity and our approach that your giving continues to grow to effectively help our community for many years to come.

## Our Approach

WHY DON'T WE SIMPLY RECEIVE DONATIONS AND DISTRIBUTE DIRECTLY OUT TO CHARITIES?

We believe in the long-term potential for strategic philanthropy to have a significant impact in our communities over decades. One-off granting and meeting immediate needs is a wonderful way to give. But our approach is to invest and grow the funds so that we can continue to give to the next disaster, the next human need and the next generation of social issues. We are building long-term funding streams for charities towards our vision of stronger communities.

Our invested funds and giving is a collective action made up of the Be BlueRock Foundation main fund (representing the passions of the BlueRock community) and named sub-funds by our individual, family and business clients.

## Funds under Management

(AS AT 30 JUN 2023)

You can open your own sub-fund within our Foundation and watch it grow each year. Contributions are tax deductible and grants distributed to charities can directly help the community where you live and or work. You can name your own sub-fund for your company or family or in honour of someone – then you get to focus on the charity giving. The Be BlueRock Foundation takes care of the investment, the administration and reporting for you. Your contributions will automatically grow in line with the Foundation's investment portfolio's performance. You can contribute to your sub-fund as often as you like, to accelerate its growth and highlight this giving to your family, staff and customers.

Interested in creating your own giving legacy to give back for decades to come? Get in touch today.



### Be BlueRock Foundation Main Fund

THE FOUNDATION MAIN FUND SUPPORTS 3 CAUSE AREAS:



Climate & the Environment



Youth Mental Health



Financial Literacy for Vulnerable Cohorts

### Philanthropy Sub-Fund Clients

SOME OF THE CHARITIES SUPPORTED BY SUB-FUND CLIENTS:



THE FUNDING NETWORK AUSTRALIA



FRRR Foundation for Rural Regional Renewal



RALLY4EVER



THESE ARE THE DOLLARS TRUSTED WITH US FOR IMPACT INVESTING TO GROW OVER TIME:

**\$125K**

BE BLUEROCK FOUNDATION MAIN FUND

**\$3.6M**

PHILANTHROPY CLIENTS SUB-FUND ACCOUNTS



# Our People

## Key Updates

The time and energy devoted by our people is second to none. We are most grateful for the efforts of our Be BlueRock Foundation Trustee Board members, and our BlueRock employee subcommittee – our ‘Charitable Taskforce’ members.

The driving force from day 0 has been Kaitlin Beattie, our outgoing Philanthropy Manager and we thank her for all her work setting up the foundation for success. Our incoming Philanthropy and Impact Manager for FY24 is Ishara Fernando.



### Kaitlin Beattie

FY23 PHILANTHROPY MANAGER



### Ishara Fernando

FY24 PHILANTHROPY & IMPACT MANAGER



# Our People

## Be BlueRock Foundation Board Members

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



### Adam Morse

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 runs the BlueRock Family Office division.

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

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

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.

# Our People

## Be BlueRock Foundation Board Members



### Tabitha Lovett

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 450+ charitable trusts with combined funds under management of \$1.8b, distributing over \$70m annually. She managed relationships with more than 30 not-for-profits with combined investments of \$300m+ at Equity Trustees.

Tabitha is BlueRock's Philanthropy Specialist. Tabitha is delighted to be a trustee of the Be BlueRock Foundation, passionate about the role that philanthropy plays in the community in tackling social issues that require innovative, compassionate and sustainable solutions.



### Marco Saccotelli

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, as well as estate and business succession planning. Marco is a Director of Law.

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

Jo has over 20 years of marketing experience across the commercial, education and community sectors, with many years spent delivering communications and content strategies within youth and mental health organisations. Jo is the Director of Brand, Sales and Marketing at BlueRock.

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

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 is the Executive Managing Partner of Finance at BlueRock.

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.



### Lyle Meaney

Lyle has over 25 years' experience working in private banking and wealth management across a range of private, public and large corporates. Volunteering as a Committee Member, President, Coach and Team Manager of his children's sporting teams, as well as actively giving back to his local community through charitable events, is something Lyle has always been passionate about.

As BlueRock's Executive Managing Partner of Wealth, Lyle feels it is an absolute privilege to serve as a trustee of the Be BlueRock Foundation to support financial literacy, youth mental health and the environment, and to positively contribute to the community within which BlueRock serves its clients.



# Our People

## BlueRock Employee Subcommittee Members

FOUNDATION TASKFORCE

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 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 fundraising events.



**Aidan Long**  
MANAGER,  
ACCOUNTING



**Rosie Mudge**  
OPERATIONS &  
EXPERIENCE OFFICER,  
OPERATIONS



**Nick Reilly**  
TECHNOLOGY &  
EXPERIENCE  
MANAGER,  
DIGITAL



**Patrick McKinlay**  
LAWYER, LAW



**Holly Bowman**  
SUPERVISOR,  
ACCOUNTING



**Regant Chet**  
SUPERVISOR,  
ACCOUNTING



**Alex Hollick**  
MANAGER, SEO &  
CONTENT, DIGITAL

### FY2024 NEW MEMBERS



**Seamus Flagg**  
INVESTMENT  
ANALYST, WEALTH



**Gemma Wu**  
CONTENT  
PRODUCER, BRAND &  
MARKETING



**Helen McMillan**  
PRIVATE CLIENT  
MANAGER  
(STRATEGIC ADVICE),  
WEALTH



**Flynn O'Connell**  
LAWYER, LAW



**Clementina Maione**  
ASSOCIATE  
DIRECTOR, LAW



**Rabia Javed-May**  
DIRECTOR, LAW



**Rhiannon Clews**  
SENIOR MANAGER,  
ACCOUNTING



**Leesa Devine**  
TEAM ASSISTANT,  
ACCOUNTING



**Adam Henwood**  
ASSOCIATE DIRECTOR  
(GROWTH &  
PARTNERSHIPS),  
DIGITAL



**Louie Kinder Rycroft**  
RECEPTIONIST &  
OFFICE ASSISTANT,  
OPERATIONS



**Tien Do**  
MANAGER,  
ACCOUNTING

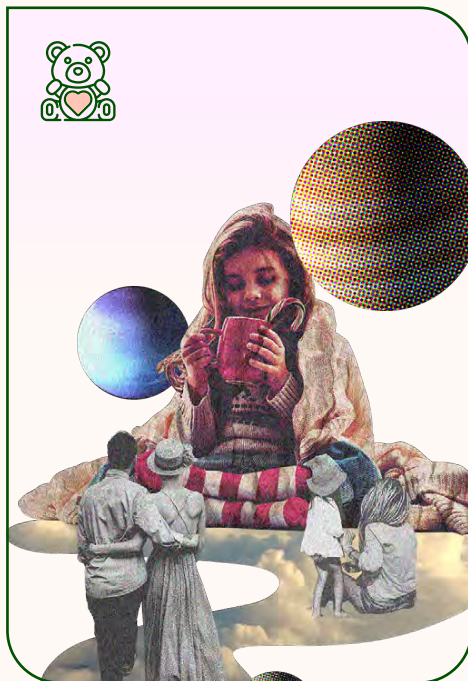
# Key Cause Areas



## Conservation & 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.

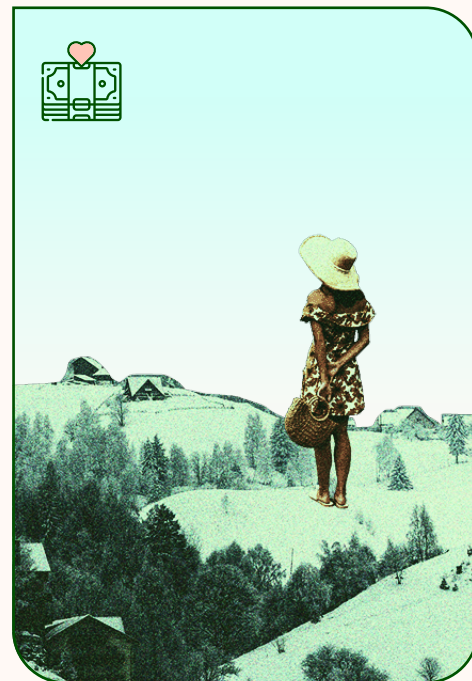


## Youth Mental Health

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.

Research shows that 50% of mental health disorders begin before the age of 14. Through our corporate giving and fundraisers, BlueRock supports charities that support young people to prevent mental ill-health from a young age, to build resilience and to reduce the lifetime prevalence of mental health disorders.



## 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.

# Charity Partners

## Conservation & the Environment



The Odonata Foundation provides advice, support and other services to organisations, businesses and individuals seeking to unlock the value of nature and help ensure the ongoing protection and recovery of the Australian environment and its plants and animals. Odonata's 30/30/30 vision is to create 30 sanctuaries and save 30 species of animals that are under threat of extinction by 2030.

Thanks to the support of philanthropy and impact investors, Odonata has made significant headway in establishing incubator programs, creating new sanctuaries and experiences to raise awareness.

There is a business case for biodiversity – businesses can own a sanctuary to save wildlife and reverse extinction. Businesses can also explore carbon offsetting, nature-based business ideas (through the accelerator and alumni programs) and connect employees with nature.



WORDS FROM SAM MARWOOD,  
CHIEF EXECUTIVE OFFICER OF ODONATA

“What I love about partnering with BlueRock is the ease at which they identify how they can help us to achieve the outcomes we are after. We are focused on supporting businesses to work alongside nature and this requires some different thinking; BlueRock has always been a great encouragement.

“What Odonata envisions by partnering with BlueRock is to uncover more entrepreneurs and business leaders willing to build nature into their business.

“BlueRock has already had this impact in our partnership so far by getting alongside many of the businesses Odonata have incubated to ensure they have their processes in place and by ensuring that we efficiently identify the best enterprise structure for each new business.

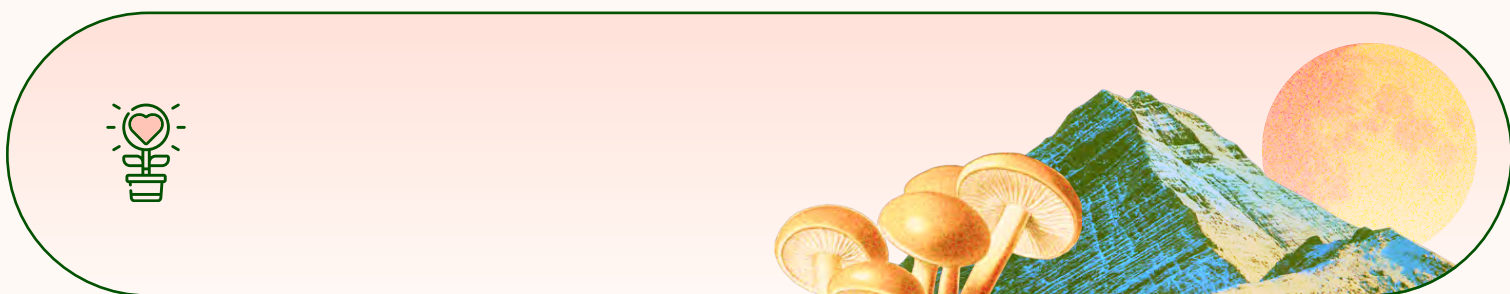
“Odonata & BlueRock are great partners because we are focused on encouraging more people to have a crack at chasing their dreams. In our case this is encouraging nature-focused people to pursue their business idea. We need more good people, money and ideas to bring wildlife back from the brink.

### WISHLIST:

If Odonata had more support from BlueRock, we could inspire more people to pursue their nature-focused business idea, help any business to take practical steps to work alongside nature (not just reduce paper usage), and support more family funds to leverage their generous donations to go further through nature-focused business models.”



BlueRock is funding 3 years of Odonata's 'Wild Ideas' business incubator, which, combined with Taronga Zoo, is now called the "HATCH Accelerator Program". BlueRockers provided their time, talent and expertise to the accelerator 'ecopreneurs' for the first program in 2023. The objective of this HATCH business accelerator is to support people to include biodiversity into businesses and business ideas. With this partnership, together, we can spark and accelerate change toward businesses that have a positive and innovative impact on nature.





# Charity Partners

## Youth Mental Health



### GIVING KIDS THE SMARTS TO DEAL WITH THE HARD STUFF

Life Ed Victoria has been a leader in providing health and well-being education for 40 years. Their preventative health, well-being and safety education programs empower children to make informed decisions. The topics include drugs, alcohol, vaping, cyber safety, health and well-being, respectful relationships and sexual health.

### WHAT THEY HAVE TO SAY ABOUT PARTNERING WITH BLUEROCK

“Life Ed Victoria is thrilled to be a partner of the Be BlueRock Foundation.

“The creation of a tailored social media strategy by BlueRock allowed us to increase our online presence in 2023 to assist in deeper engagement and more meaningful interactions with our audience.

“One of the highlights of 2023 was the privilege of attending the Inaugural Be BlueRock Foundation Gala Ball. The ball was more than an evening of celebration – it was a powerful opportunity to connect, collaborate and forge meaningful relationships. The chance to network with fellow Be BlueRock charities and like-minded individuals was a rare occasion to share experiences, insights and aspirations.

### WISHLIST:

1. “Our mission is to give kids the smarts to deal with the hard stuff. If we had more funding, we would continue to expand the offering of our health and well-being program that covers respectful relationships, cyber safety, drugs and alcohol, and health and well-being. This new offering would see Life Education Victoria delivering to larger groups of students allowing us to reach more kids who are in desperate need of our programs.
2. Collectively, our aim would be to share the positive impact of our programs through the power of storytelling. With BlueRock’s support and expertise, we would like to visit schools and children who participate in our program to gather insightful interviews and footage, to create a bank of video stories for our organisation.”

### LIFE ED VIC



### OCEAN MIND

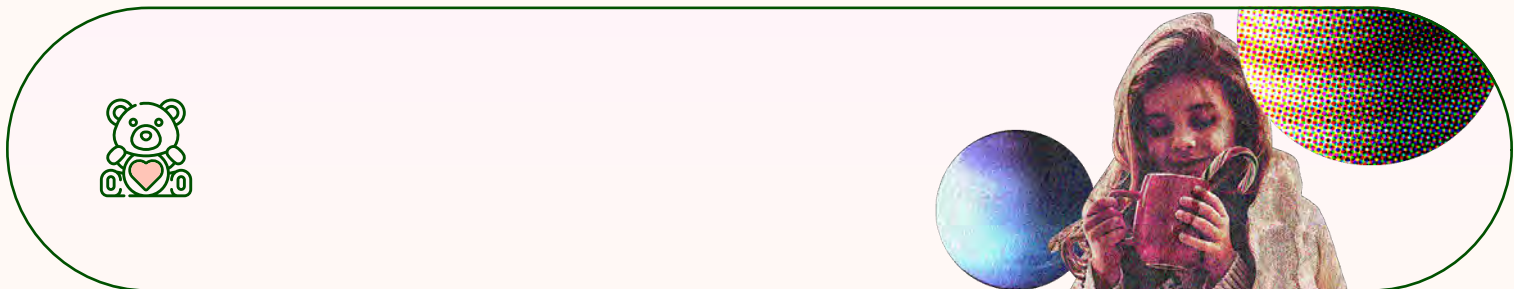


### CHANGING LIVES THROUGH SURFING

Ocean Mind is a therapeutic surfing charity that enriches people’s mental health, relationships and potential through surfing. We’re committed to developing evidence-based programs that create life-changing experiences for people experiencing mental health challenges, social isolation and disabilities.

### WHAT THEY HAVE TO SAY ABOUT PARTNERING WITH BLUEROCK

“Over the past year, BlueRock has been a valuable ally for Ocean Mind, providing essential pro bono support that has contributed to our progress. Notably, they played a key role in redesigning our website, refining the copy and overall look to enhance user experience, while optimising SEO for better accessibility. Additionally, BlueRock generously assisted with our financial reporting and board reporting processes, streamlining these aspects for improved efficiency. Their insurance review also provided valuable insights into our evolving insurance needs. We deeply appreciate BlueRock’s collaboration and the impact of their contributions on our growth.”



# Charity Partners

## Financial Literacy for Vulnerable Cohorts



### MACKILLOP FAMILY SERVICES



#### MAKING FINANCIAL GOALS ACHIEVABLE

MacKillop Family Services believes that every child deserves to grow up in a safe and nurturing family environment, where they can develop the skills and values they need to thrive as adults.

MacKillop gives effect to this vision in 3 ways:

1. By delivering programs that enhance the skills of parents who are struggling to provide a safe home
2. By providing foster care and residential care to children who have been temporarily removed from their home
3. By delivering specialist education programs to ensure children remain connected to education whatever challenges they may be facing.

MacKillop Family Services' work is always informed by the voice of young people. They know they are the experts when it comes to their own lives. One of the biggest gaps young people have identified is the absence of effective programs to provide the skills and resources they need to live independently when they transition into adulthood.

BlueRock staff are therefore generously donating their time and skills to develop a bespoke financial literacy program, tailored to the needs of 15-18-year-olds who are preparing to transition out of foster care and into independent living.

#### WISHLIST

1. "With the support of BlueRock and its advisors, young people will understand their care experience does not define them, and that goals such as travel, home ownership and financial independence are achievable.
2. By sharing the stories of young people living in care with BlueRock and its stakeholders, we will change the narrative and reduce the stigma that holds back these incredibly brave and resilient young people.
3. We will collaborate with BlueRock and its clients to fund innovative programs that better equip young people with the skills for independent living, while delivering on your philanthropy goals."

#### WHAT THEY HAVE TO SAY ABOUT PARTNERING WITH BLUEROCK



WORDS FROM TAYLA AYLIFFE,  
YOUTH AMBASSADOR GROUP AT MACKILLOP

"It was so empowering to meet the team from BlueRock. They listened without judgment and instantly understood the challenges faced by a young person who has never had adult role models to educate them about financial literacy. I feel confident we can work together to co-design a program that will give young people hope that financial goals they had previously considered impossible are within reach."



# Charity Partners

## Charity Partners



### THE YOUTH IMPACT FOUNDATION

The Youth Impact Foundation seeks to connect, integrate, and enable charities that focus on youth mental health, wellbeing, and leadership to expand their reach and amplify the impact on young people.



### FINANCIAL SUPERWOMEN

Financial Superwomen hosts empowering financial literacy workshops for survivors of domestic violence to be financially secure, confident and independent.



### THE HEART FOUNDATION

The Heart Foundation has a vision of an Australia free of heart disease and is the trusted peak body working to improve heart disease prevention, detection, and support for all Australians.

## Philanthropy Network



### THE FUNDING NETWORK

The Funding Network brings people together to find, fund and support grassroots social change programs that directly help people in need.



### THE AUSTRALIAN ENVIRONMENTAL GRANTMAKERS NETWORK

The Australian Environmental Grantmakers Network provides access to hundreds of small grassroots organisations and projects that work to tackle environmental concerns.



### PHILANTHROPY AUSTRALIA

Philanthropy Australia is a not-for-profit organisation working to achieve a generous and inclusive Australia through more and better philanthropy.



# Key Events

## Gala Dinner

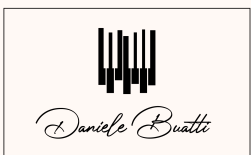
May 2023

Held at the beautiful Luminare in South Melbourne, the inaugural Be BlueRock Foundation Gala brought together BlueRock staff, clients, charity partners, and community partners for a night of entertainment, food, wine and fundraising. The event raised \$47,000!

### EVENT SPONSORS



### PRO BONO PARTNERS



Raised  
**\$47,000**

### THE PANELLISTS

2023



**Tabitha Lovett**  
Board Member, Chair of the Be BlueRock Foundation



**Andrew Bennetto**  
CEO, Life Education Victoria



**Rachael Parker**  
CEO & Founder, Ocean Mind



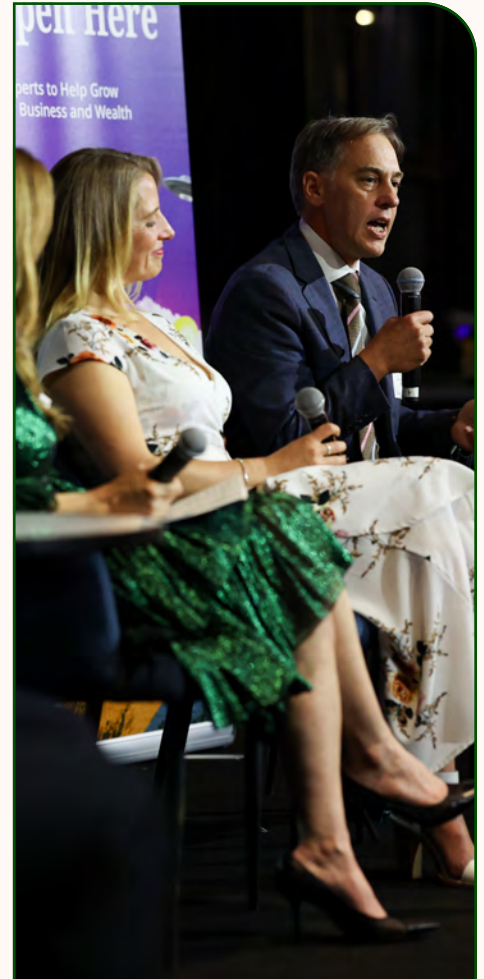
**Sam Marwood**  
CEO, Odonata and Managing Director & Co-Founder, Cultivate Farms



**Sam Patterson**  
Director of Community Engagement at MacKillop Family Services

### THE BE BLUEROCK FOUNDATION CHARITY GALA DINNER

2023





# Key Events

## Charity events held in FY2023



### TFN LIVE CROWDFUNDING EVENT

We supported The Funding Network to run a crowdfunding pitch event for 3 not-for-profits helping women and girls on 11 October 2022.

OCT 2022



### LIFE ED VIC | HEALTHY HAROLD

A BlueRock 'Lunch 'n Learn' event held on 28 May 2023 to educate staff about the Life Ed organisation and how they can get involved.

MAY 2023



### FINANCIAL SUPERWOMEN PRO BONO WORKSHOP

The first Melbourne workshop held on 27 May 2023 for survivors of domestic violence to learn financial literacy.

MAY 2023



### LIFE ED VIC | TOUR DE HAROLD, BRIGHTON

A 28km cycling event held on 28 May 2023 through which a team of 4 BlueRockers raised 53 donations totalling \$2,328 for Life Ed Vic.

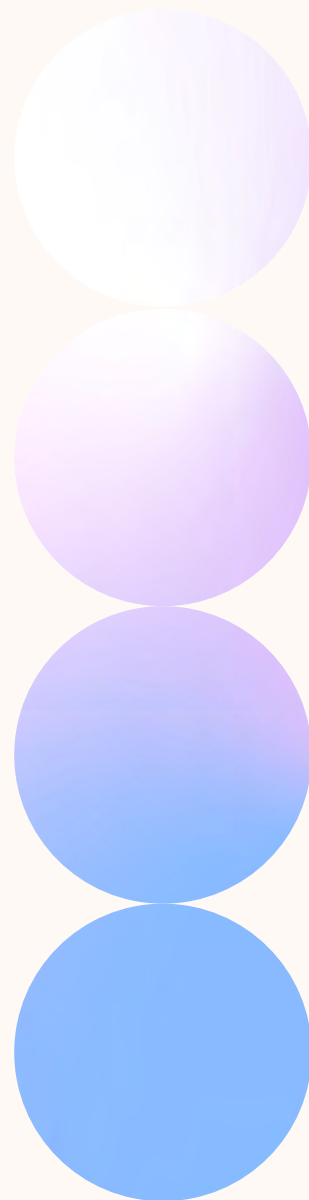
MAY 2023



### RUN4DAZ FUN RUN

Staff attended Run Melbourne to raise funds for the Heart Foundation on 24 July 2022, and again in July 2023, in honour of Dario 'Daz'.

JULY 2022 AND JULY 2023

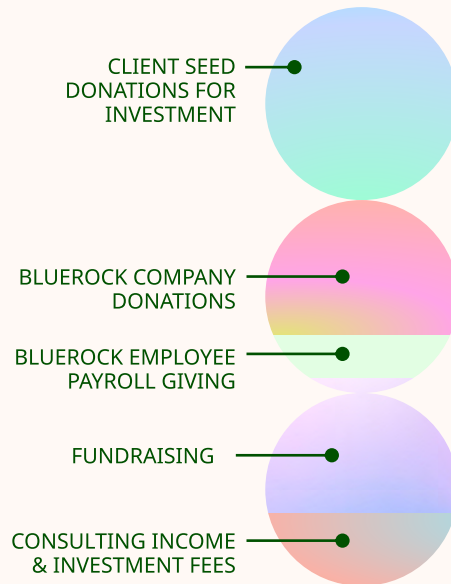


# Financial Snapshot

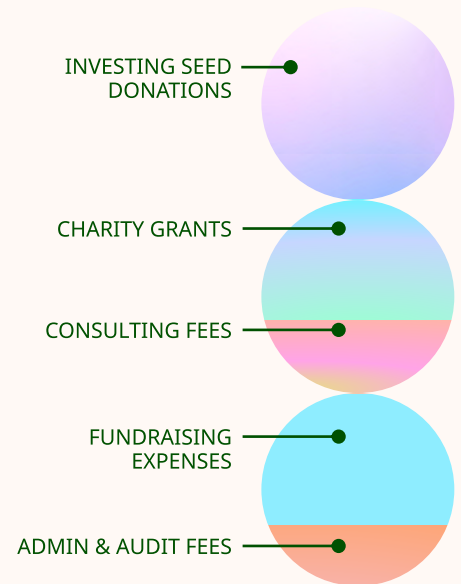
The following is a brief overview of how our foundation’s finances work. Our Audited Financial Statements are available [here](#).

We’d like to express our deepest gratitude to our regular donors from BlueRock (employees and divisional contributions) and our clients adventuring on this philanthropy journey with us.

## Revenue

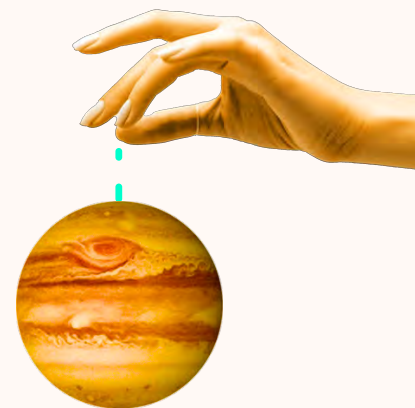


## Expenses



## Donations Year on Year

Clients’ seed donations to be invested made up the majority of donations received in FY23 at \$2.8m out of \$3.2m. Almost \$400k was raised from BlueRock donations, employee donations, consulting income and fundraising.



# Get Involved!

## TREASURE



### Donate Money

General community members can make a tax-deductible donation to the Be BlueRock Foundation [here](#).

BlueRock employees salary sacrifice pre-tax through BlueRock's Payroll Giving Program. We asked our employees: "Why?"

- "Because it's an easy way to contribute"
- "To give back to important causes"
- "To support the Be BlueRock Foundation vision"
- "It's an alternative to volunteering"
- "I believe in what the Be BlueRock Foundation is doing"

### Donate Resources

If you have software, equipment, devices, workspaces etc. that you think a charity could utilise, consider donating these. If you can discount your rates for charities, offer low bono services to enable and build capacity so they can thrive.

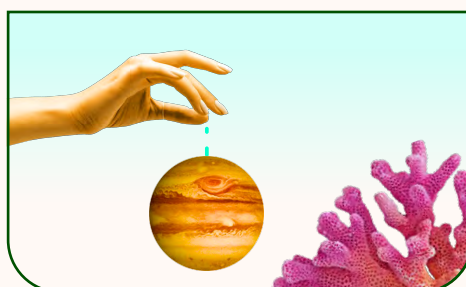
## TIME



### Donate Time

Combine team-building days or celebrations with purposeful volunteering – charities have experiences for individuals and groups. Volunteer your time with our charity partners.

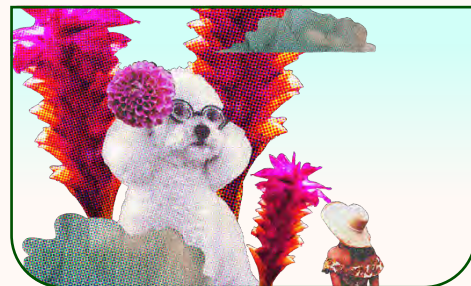
## CONNECTIONS



Know someone who could help our charity partners? Looking to partner with a foundation like ours? Interested in creating your own giving legacy to give back for decades to come?

Get in touch today.

## TALENT



### Donate Talent

Mad Skillz! If you've got the passion and time to donate skilled volunteering hours, then provide pro bono and low bono services to charity organisations. Contact us to provide pro bono services to our charity partners.

## Get in Contact



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[Be BlueRock Foundation](#)



[@be\\_bluerock\\_foundation](#)



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[www.bebluerockfoundation.org](http://www.bebluerockfoundation.org)