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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.



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Letter from the Board

In 2025, we are celebrating 5 years of the Be BlueRock Foundation. BlueRock established the Foundation to formalise strategic philanthropy as a priority for BlueRock's community, while also offering BlueRock clients the opportunity to structure their philanthropy and bring a greater sense of purpose to wealth generation.

We have bravely navigated the evolution of our people and forged a new phase of BlueRock's giving strategy. This year, we warmly farewelled our founding Board Members Tabitha Lovett, Kaitlin Beattie and Marco Saccottelli and welcomed Wayne Green and George Botros onto the Foundation Board. Their skillset and experience extend the diversity, sector experience and strength of the Foundation's leadership group.

In 2024-2025, we held successful fundraising campaigns through participation in Run Melbourne, trekking overseas on the Kokoda Trail and at our Melbourne Gala Dinner, bringing together the broader BlueRock community of employees, clients, business partners and friends to engage in philanthropy.

We are immensely proud of the different ways BlueRock has been able to help the community through the provision of grants, premium office space, employee time, talent, ties and testimonials, advocating for the changemakers on the frontline helping people and the planet.

Our Philanthropy team is supporting clients with Named Giving Funds (Sub-Funds) or Private Ancillary Funds. The opportunity to inspire more and better philanthropy is here with the significant transition of wealth to the next generation that is now underway (valued at \$5.4 trillion in Australia over the next 20 years). The Be BlueRock Foundation is committed to supporting families and next-generation wealth holders to engage meaningfully with their assets for good.

In the year ahead, we look forward to forging new BlueRock-charity partnerships in the cause areas that BlueRock's employees have valued and voted on: improving mental health, helping people affected by family violence or homelessness, and protecting the environment. And, as always, we'll continue our mission of inspiring philanthropy to build stronger communities and bringing a greater sense of purpose to wealth.

Lisa Marshall

on behalf of the Be BlueRock Foundation Board Members



Lisa Marshall

Foundation Board Member & Managing Director of BlueRock Accounting

Vision, Mission, Vision, Values

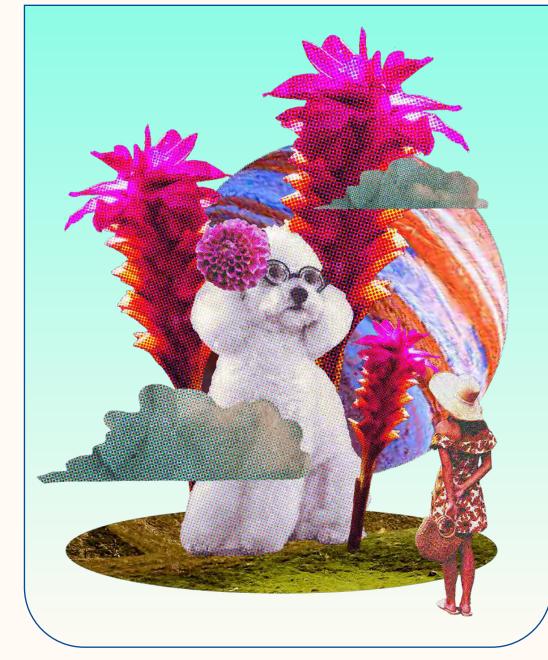


Vision
Inspiring philanthropy to build strong communities.



Mission

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



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

Our People Board Members



Lisa Marshall Board Member, Managing Director of Accounting



Jamie King Board Member, Executive Managing Partner of Finance



Lyle Meaney Board Member, Executive Managing Partner of Wealth & Law



Jo Stanlake Board Member, Chief Marketing Officer and Managing Director of Digital



Wayne Green Board Member, Philanthropy Specialist



George Botros Board Member, Director of Law



Ishara Fernando Secretariat of Be BlueRock Foundation, Philanthropy and Impact Manager

Our People Charitable Taskforce



Aidan Long Associate Director, Accounting



Tien Do Associate Director, Accounting



Seamus Flagg Investment Advisor, Wealth



Gemma Wu Marketing Coordinator, Operations



Ethan Lim Graduate Accountant, Accounting



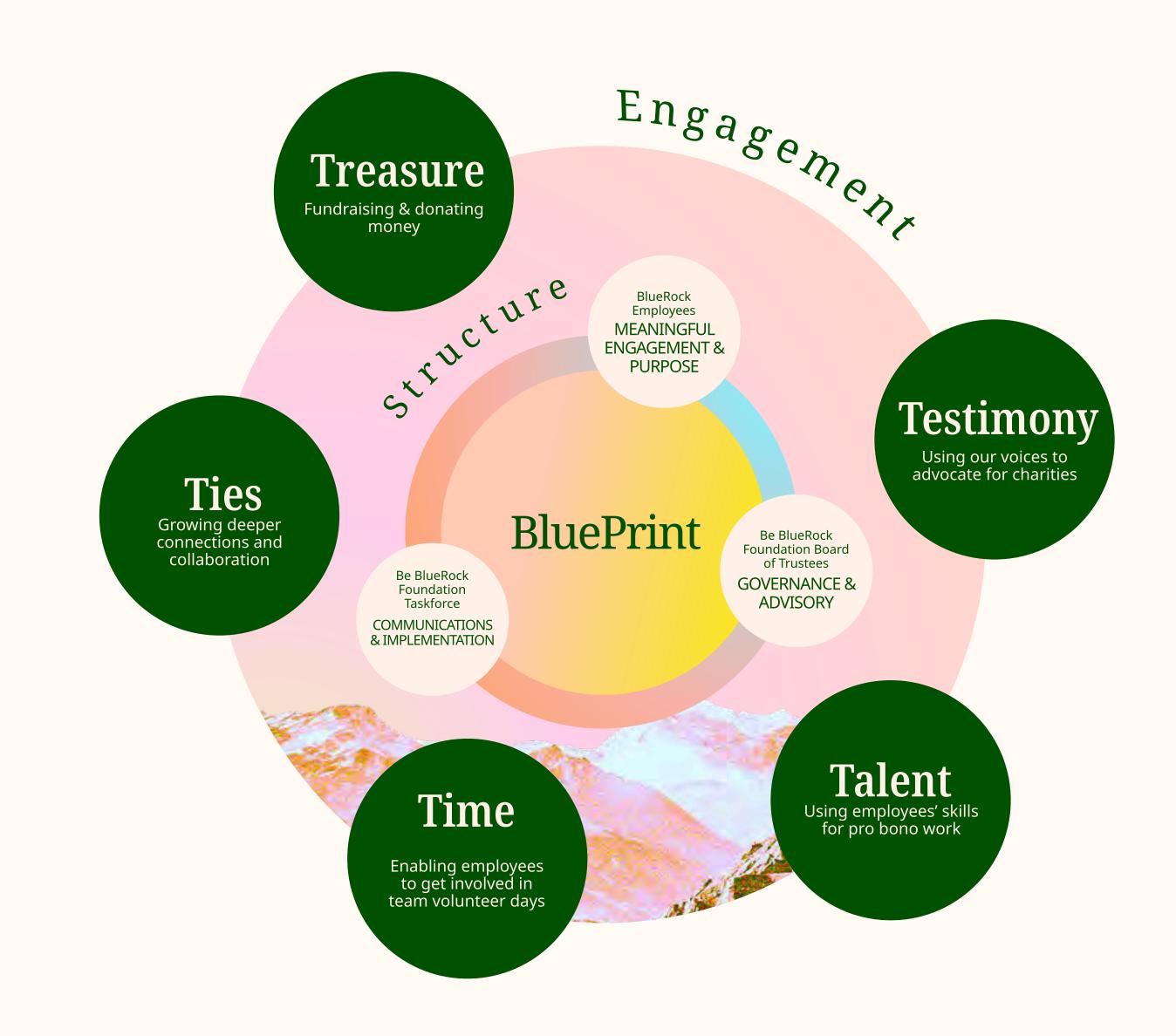
Our Giving Blueprint

Here is the BlueRock Giving Blueprint – our approach to giving. The Be BlueRock Foundation's giving strategy is centered on the donation of time, talent, treasure, ties and testimony, ensuring maximum impact for people and the planet. 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 and support from the leadership team and direct line managers. BlueRock has a large network to make introductions for charities, initiates partnerships and encourages collaboration. BlueRock uses its voice and reach to further amplify the impact charities are having in our community.

Outside of the Foundation, BlueRockers are also involved in diversity, equity, belonging, inclusion, carbon emissions and B Corporation initiatives using business as a force for good to create positive impact for BlueRock's people, clients, partners, the community and the environment.



FINANCIAL SNAPSHOT
FY25 IMPACT REPORT

Time

1,750
Volunteer & Pro Bono Hours

BlueRock employees get 2 days per financial year to give their time and talent to the community.

I just wanted to say a huge thank you again for volunteering for Daffodil Day - we really appreciate all your effort, time and support.

And you were all so lovely, warm, kind and generous! Everyone in Cancer Council Victoria had such great things to say about you too. We're big fans! Just to let you know... we did really well across the 12 activation sites – I think we'll hit \$90k, which is fantastic considering we were around \$50k last year. The Collins Square site raised \$14.5k for 2 days and Rialto raised a whopping \$40k for the 2 days.

CANCER COUNCIL VICTORIA, DAFFODIL DAY, 22 AND 23 AUGUST 2024







Just like to say how thrilled and proud I am of everyone for giving up their hard-earned Sunday, particularly when it's cold and so close to 30 June. I recognise how under the pump everyone is at the moment and to give up one of your few "off days" to help less fortunate members of the community is awesome.

The funds raised are likely to dwarf past years' Community Cups – our bar was the highest grossing with \$52k in sales. It's a testament to you all to remain smiling and happy despite the mud, the borderline frostbite every time you grab another tinnie, whilst also bearing complaints. Members of the Reclink Board, the CEO and the founder have all expressed how remarkable the team at BlueRock is and you guys are at the forefront of that.

RECLINK COMMUNITY CUP, 15 JUNE 2025







Talent

Here are some examples of pro bono projects through which Bluerockers gave their talent to support meaningful causes.



We Are Mobilise Pro Bono Accounting Work

With just a few hours of accounting pro bono work, we were able to help the impactful homelessness charity Mobilise unlock \$75,000 of GST credits helping them help more people doing it tough in our community.

HATCH Accelerator Program with Taronga Zoo (3rd year running) Pro Bono Finance Workshop

It was great to be presenting the Finance Workshop along with Rhys, Alannah and Aidan for the HATCH cohort once again. As the program evolves, we see more and more passion and sophistication in the nature solutions presented by the entrepreneurs, highlighting the ongoing progress the HATCH team has made in this space. Great to have played a small part in the impact the program is having!

Regant

BlueRock Accountant

The workshop BlueRock delivered for HoMie was fantastic. Great vibes, but more importantly real clarity of information and purpose. Our team came away from it energised, uplifted, and upskilled.

homie

Jack Howes
Head of Funding & Partnerships, HoMie

I had the opportunity to deliver a Finance 101 presentation to the staff at HoMie, many of whom come from nonfinancial backgrounds. It was a great chance to practice my public speaking skills, but more importantly, it led to an eye-opening discussion with the HoMie team. I gained valuable insights into the internal challenges the staff face, which gave me a better understanding of how we can use this experience to better support our clients moving forward.

Neth

BlueRock Accountant

BlueRock fuels hope – 30 youth and equity charities reviewed with expert guidance and heart

BlueRock provided 5 rounds of pro bono financial due diligence checks for 30 small charities, working together with The Funding Network to help young people thrive and boost equity and inclusion. This pro bono partnership arrangement with The Funding Network equates to over \$11,000 in skilled volunteering for the sector.

It was great to learn more about different charities with inspirational missions helping people around Australia. The work felt like I was doing something to help those clients of the charities, even though I wasn't really there on the ground. Overall, it was a really positive experience.

I thoroughly enjoyed helping the Funding Network with the background financials of six short-listed charities. They were all very different businesses and targeted such specific causes, which made it interesting work. It was rewarding, especially being able to attend the crowdfunding event and getting to hear the founders of these charities speak. It was a fantastic demonstration of humanity seeing wealthy (or just plain ol' generous) people pay it forward and raise \$30k for each charity in a single night - certainly brought a tear to my eye.

Two BlueRockers reflect on the experience

OUR IMPACT

FINANCIAL SNAPSHOT

FY25 IMPACT REPORT

Ties

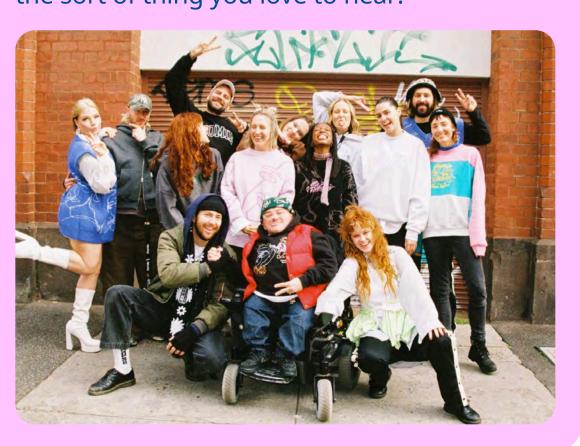
Other ways we help charities is by introducing charities to our network, opening up funding and partnership opportunities.



homie

66

After introducing HoMie to a BlueRock client in retail property leasing, they said: "Thanks so much for making that intro - definitely the person we need to be speaking to, "We'll do whatever we can to get you into the city" is the sort of thing you love to hear!"







Thank you passing on the [grant opportunity] – super grateful that you keep opening opportunities!!







I wanted to say a huge heartfelt thank you for all the ideas and leads you shared with me during and after our meeting in Melbourne a few weeks ago.

It's been truly amazing as I've worked through my notes ... learning heaps, finding new opportunities for Sharing with Friends etc. I attended the book launch you told me about where I met someone who wants to introduce me to a researcher / property economist interested in older women's homelessness ... exactly one of the supports we've been looking for.

Once again, thank you so much for taking the time to meet with me, and your generosity in sharing all the resources and your knowledge.



OUR IMPACT

FINANCIAL SNAPSHOT

FY25 IMPACT REPORT

Testimony

We also use our voice to advocate for charities, sharing social media campaigns and making direct introductions and charity recommendations to others.







We were able to recommend our philanthropy client to give to a more grassroots charity tackling homelessness to achieve the impact their family was looking to achieve, outside of their philanthropic fund. They chose StreetSmart Australia.







I just wanted to say a big thank you again for your generous support of TYIF, through our campaign we managed to turn \$5k into \$14,445 publicly and excitingly I just had a donor call me to match the final \$1,400 difference to make it a full \$20k. It's pretty cool to see how we can turn \$5k in \$20k with a bit of activation from our community and support from TEAF as well. So thank you so much for all your support of TYIF and making this possible for us at an important time of the financial year.

Andy
CEO, The Youth Impact Foundation



Treasure Stories of impact



ENVIRONMENT & CONSERVATION



YOUTH MENTAL HEALTH



FINANCIAL LITERACY FOR VULNERABLE COHORTS





Preventative education.

From 2023 to 2025, Be BlueRock Foundation's support opened the door for Life Ed Victoria to deliver their healthy living programs to four schools in Melbourne's western suburbs—Ardeer, Davis Creek, Westgrove and St Albans Primary. For many of these kids, Healthy Harold wasn't just a mascot, but a guide through the tricky world of friendships, respect and online safety. Life Ed Vic gives kids the smarts to deal with the hard stuff. One teacher from Davis Creek summed it up: "Before Harold, some of our kids struggled with friendships, but after the sessions, you could see real change—kids standing up for one another, showing kindness and looking out for each other." With 413 students across 20 classes getting access, we helped build a community where wellbeing isn't just a lesson—it's a habit for life.

VISIT WEBSITE



ODONATA



Be BlueRock Foundation partnered with Odonata Foundation for 3 years, backing 'Wild Ideas' to 'HATCH' nature-based startups in accelerators and education programs. In FY2025, this partnership pushed conservation into new territory. Through the Odonata Academy, hundreds of farmers, landholders and aspiring ecologists will access game-changing training on restoring biodiversity and protecting threatened species—and then take those insights back to their own communities. By sharing strategies that really work—like conservation fencing, regenerative farming and First Nations ecological wisdom—Odonata is growing a network of action heroes for Australia's wildlife. And that's exactly the kind of impact we love to see - not just planting trees but planting the seeds of change for generations to come.

VISIT WEBSITE



Direct & early intervention.

Sometimes, the ocean is the best therapist. Just ask Jack, one of 109 young people who finished Ocean Mind's sixweek surf therapy program thanks to our foundation's funding. Diagnosed with ADHD and autism, Jack once dreaded new activities and believed adults "didn't like him". But after connecting with a surf mentor and tackling his first wave, Jack discovered not just a new passion, but also a sense of belonging. His parents now describe him as happier, more open, and ready to try new things. Like Jack, 96% of kids reported feeling happier and 94% gained confidence—real-life proof that with the right support, young people can walk taller on and off the sand.

VISIT WEBSITE



System change.

When you invest in young people, the ripple effect is huge. From 2023 to 2025, Be BlueRock Foundation's backing helped The Youth Impact Foundation reach over 162,000 young people with strengths-based mental health and leadership programs, targeting students in disadvantaged, regional, and Indigenous communities. These kids saw a 21% jump in self-leadership, a 9% boost in resilience and a 6% drop in suicidal thoughts. One project took high schoolers to Canberra to discuss leadership with Members of Parliament and business leaders, giving them confidence to shape their communities. One student put it best: "I wasn't really aware of my values before, but now I want to use them to serve others." With outcomes like these, we're not just changing lives—we're helping young leaders build a kinder future through The Youth Impact Foundation's game-changing model to drive innovation and collaboration in the youth sector.

VISIT WEBSITE



Total

\$64,100

OUR IMPACT

FINANCIAL SNAPSHOT

Treasure BlueRock's Employee Giving

"

From basketballs and soccer balls, to backpacks, hats, and water bottles, the generous staff at BlueRock have collectively donated sporting items to help vulnerable people get involved in a range of activities. Having access to this type of equipment breaks down barriers to participation and builds motivation to get involved in programs that boost mental and physical health, as well as foster social connections.

STREETSMART AUSTRALIA

Cooper ran the Sydney Marathon, raising

\$3,003

for Cure Cancer.

Katie led and joined the 2025 Ride for Lily, which altogether raised over

\$250,000

for childhood cancer research

BlueRock's participation in the Cancer Council's Biggest Morning Tea event gave

\$450

to make a difference to those impacted by cancer

\$484

Fundraised for Carlton Respects at their fun run event





Jo's Royal Children's Hospital Foundation Good Friday Appeal Run for the Kids raised over

\$25,000

for the benefit of The Royal Children's Hospital in Melbourne

Lisa joined the Variety Bash to raise

\$44,413

for Variety Children's Charity of Victoria

Kokoda Charity Trek delivered

\$33,150

to 3 charities in Australia & Papua New Guinea

Ani walked 39kms World Suicide Prevention Day for Lifeline's Out of the Shadows Walk to connect and bring hope to 70 Australians raising \$2,726

10 employees

As a team, BlueRock raised

\$2,565

sporting some marvellous mo's around the office. These donations go towards everything Movember is doing to improve the lives of men, through education, awareness, support and access to the right treatments. Plus volunteers and prizes given at at Movember Golf Day.

Run4Daz Campaign

2024 fun run for the Heart Foundation

\$6,700

bringing our 4 years of supporting them in memory of of colleague Dario to a total

\$17,720



Festive Gift Appeal December for Reclink Australia (pre-loved sporting goods) & 30 sporting gifts and gift cards for StreetSmart Australia's charity partner Wombat Housing Projects. By supporting StreetSmart Australia's Active Futures program, we're helping vulnerable children, youth, migrants, and those facing homelessness connect through sports and recreational activities.

Treasure BlueRock's Shared Resources



We wanted to send you a MASSIVE shout out for allowing us to crash the BlueRock Office this week. What a fabulous space you have there in Little Collins which was simply perfect for our Welcome Day and Team Update.

The 2 rooms we used suited us perfectly and it really did help make the time with our team (which only happens in person once a year) just that little bit more special.

Thanks you soooo much and well done on all you do to help your work space flow so fabulously.

THE VIC LEADERSHIP TEAM, RAISE FOUNDATION

Office Space

We have given charities over \$2500 in value of use office space in 2024-25.

Thank you so much for attending the recent Female Funders
Networking Lunch on 19 March. It was just such a rich discussion about the charities we love supporting and it has led to at least two collaborative funding efforts that I've heard of so far, so thank you so much for your time, energy and support. Thanks again to BlueRock for hosting us at BlueRock Foundation, it was great to see the space.

Female Funders Network Melbourne Roadshow Equitable Philanthropy Just coming to the end of a productive day of planning for the year ahead at 505 Little Collins—thanks so much again for hosting us, the space has been perfect!

Nell

Local & Independent News Association

We are holding a workshop for service providers who support women who have been incarcerated, the workshop is facilitated by women with lived prison experience.

TaliaProject:herSELF

Office Equipment

This year we also refurbished & donated 2 laptops to MacKillop Family Services young people worth \$2k to help them with their education.

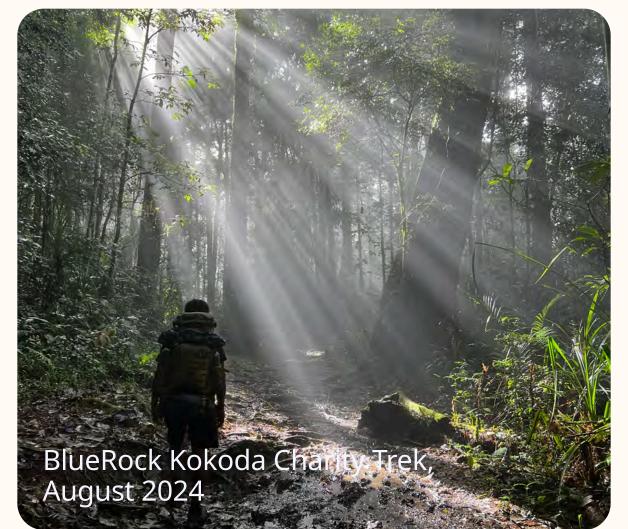


Events

Here are some examples of events where Bluerockers gave their time, talent or fundraising efforts for wonderful charities.





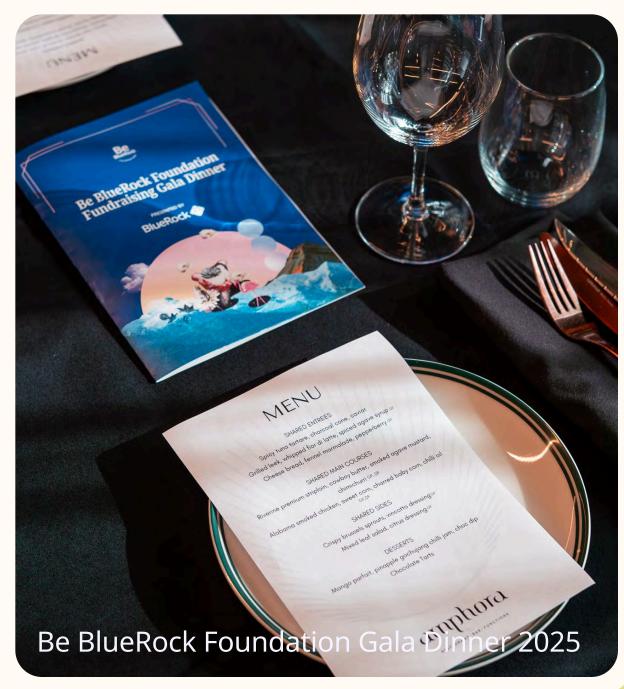








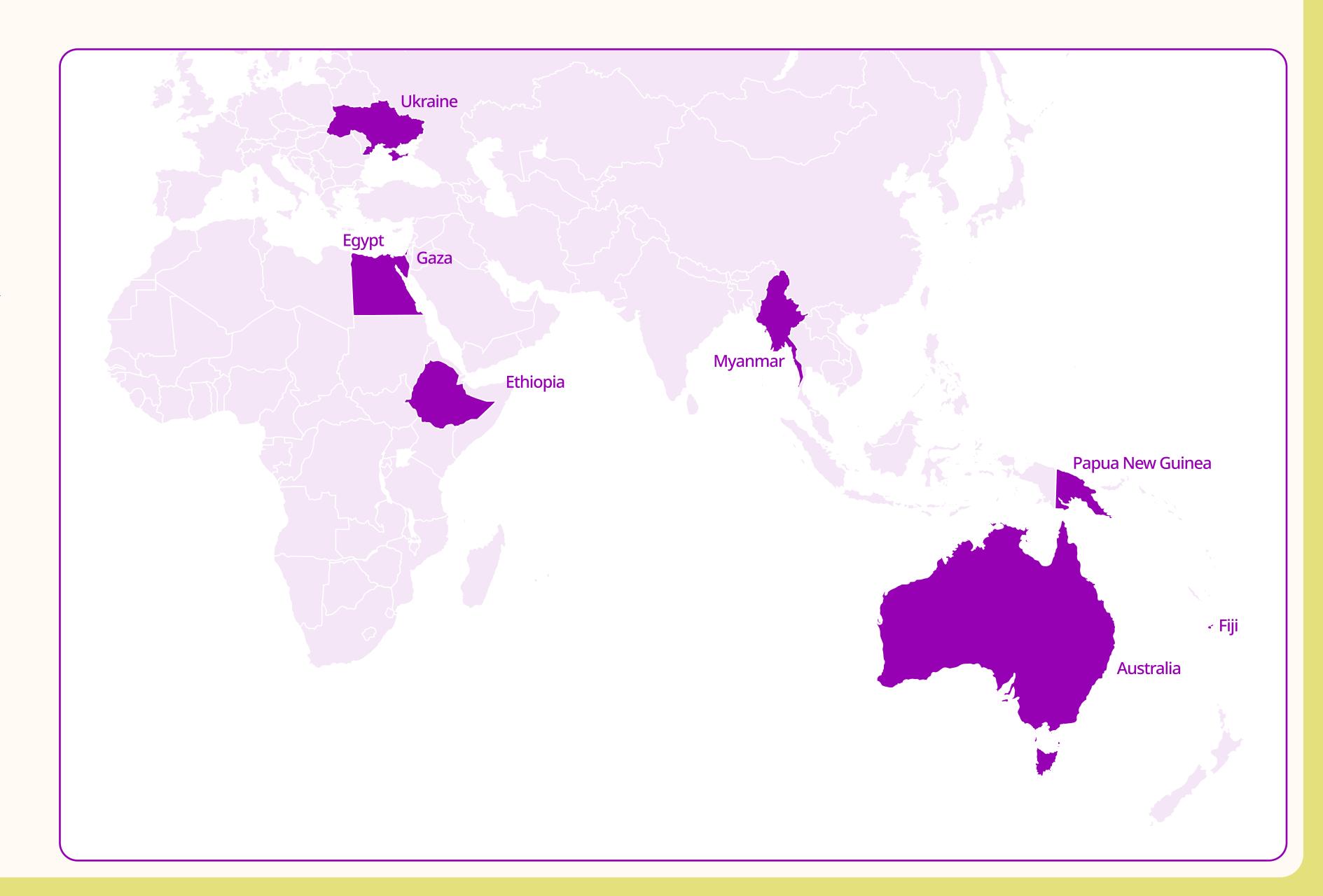




Giving Globally

Giving to More Places

Our giving in FY2025 was truly global, distributing \$417,000 in 56 charity distributions, supporting BlueRock's charity partners, our client's chosen charity grant recipients and our employees' fundraising.



Philanthropy Clients' 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 building stronger communities.

Our invested funds and giving is a collective action made up of the BlueRock Giving Fund (supporting causes voted by BlueRock employees) and Named Giving Funds (Sub-Funds) by our individual, family and business clients.

Structured Philanthropy

Be BlueRock Foundation is a Public Ancillary Fund.

You can open your own Named Giving Fund (Sub-Fund) within our Foundation and watch it grow each year through ESG investment in equities. Contributions into your fund are tax deductible and grants distributed to charities will directly help the community where you live and/or work. You can name your Sub-Fund after your company or family or in honour of someone. The Be BlueRock Foundation takes care of the investment, the administration and reporting for you - so you get to focus on the charity giving. 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.



OUR IMPACT INTRODUCTION FINANCIAL SNAPSHOT **FY25 IMPACT REPORT**

Philanthropy Clients' Giving

Cause Areas and Charities Supported by





GENDER EQUITY / YOUTH DEVELOPMENT / WELFARE















Named Giving Funds (Sub-Funds) in FY2025

FIRST NATIONS ISSUES



HEALTH/MEDICAL RESEARCH/HEALTH EQUITY









DEMOCRACY



YOUTURN & Baby Give Back Bridge it Wintringham





HOMELESSNESS & QUALITY LIVING ARRANGEMENTS





EDUCATION





CLIMATE & THE ENVIRONMENT















ECONOMIC INCLUSION







ASYLUM SEEKERS / REFUGEES





CHILD WELFARE / SUPPORTING DISADVANTAGED CHILDREN









Karrkad Kanjdji





CHARITIES ADDRESSING MULTIPLE CAUSE AREAS HELPING BOTH PEOPLE & PLANET

OUR IMPACT

FINANCIAL SNAPSHOT

Philanthropy Clients' Giving

Hear what a few of the charities have to say about these philanthropic gifts:



"

Your funding will help us restore hope, dignity, and security to people rebuilding their lives after displacement. You are part of a community that continues to lead with compassion and courage. Your donation is not just a financial gift; it's a powerful statement of your belief in human rights, fairness, and a future where everyone has the chance to live safely and with dignity.





On Behalf of the team at Birth for Humankind, thank you so much for your generous donation. By investing in our unique and proven program, you're helping us deliver vital support to more systemically marginalised families – and driving progress toward maternal health equity in Victoria and beyond.



The Venny's community housing shared garden space is creating a thriving, green space where kids learn to grow, harvest and cook fresh food together. Volunteers love to get involved in gardening, and children love tasting their own garden produce in fresh nutritious meals. As one mother says, "The best way to teach my kids about food, is to grow it."



Karrkad Kanjdji Trust

KKT thanked our client for "the impact your gift has on the work, land and lives of Indigenous people in West and Central Arnhem Land in support of women rangers; the investment into this exceptional program supports pathways for Indigenous women to not only support climate resilience and care for their country, but also supporting their economic, social and cultural wellbeing".

Baby Give Back



You have chosen to change a child's life and help them towards the equal start they deserve. We are so grateful for your support and generosity. Your donation ensures we can continue to support the many disadvantaged and vulnerable families in our community. Thank you for showing these families that you have their back enabling support with the most basic essentials like clothing and nappies.

Bridgeit



Creating Homes. Transforming Lives. An update on our last few months at Bridge It: Since September 2024, 16 young people have moved into The Cocoon. We've seen residents start uni, find jobs, and work toward getting their driver's license. Now living at The Cocoon, one resident says: "I love having my own sanctuary... The best part is, if I'm upset, I can find someone - I'm not alone."

OUR IMPACT INTRODUCTION FINANCIAL SNAPSHOT **FY25 IMPACT REPORT**

BlueRock's Giving Strategy Evolution

2020-2025

Previous employee-voted cause areas and charity partners

We also partnered with industry partners such as Philanthropy Australia, Australian Environmental Grantmakers Network and The Funding Network in their missions to grow more and better giving in Australia.



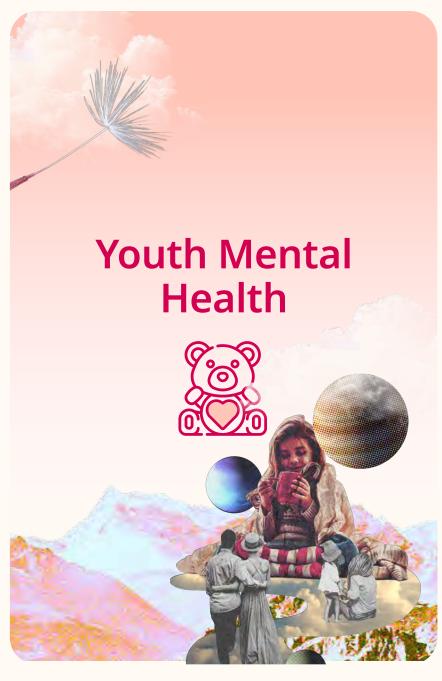


PHILANTHROPY AUSTRALIA



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. The Be BlueRock Foundation supports grassroots projects that are tackling the issues that impact on our environment to potentially halt and reverse climate change.





Suicide 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, anxiety and other mental health challenges to their families, friends and broader networks. BlueRock supports a number of organisations, which in turn support young people to live healthier, happier lives.









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. Many of the organisations we work with report an increasing demand for their services and a large percentage of the participants are single mothers, people at-risk of homelessness or survivors of family violence.





BlueRock's Giving Strategy Evolution

2025-2028

NEW employee-voted cause areas and charity partners

NEW Charity Partners









Our focus is early intervention for mental health and suicide prevention to build stronger communities.

Suicide is the leading cause of death for young Australians, constituting one-third of fatalities in those under 25. BlueRock supports organisations addressing mental health challenges with early intervention approaches.



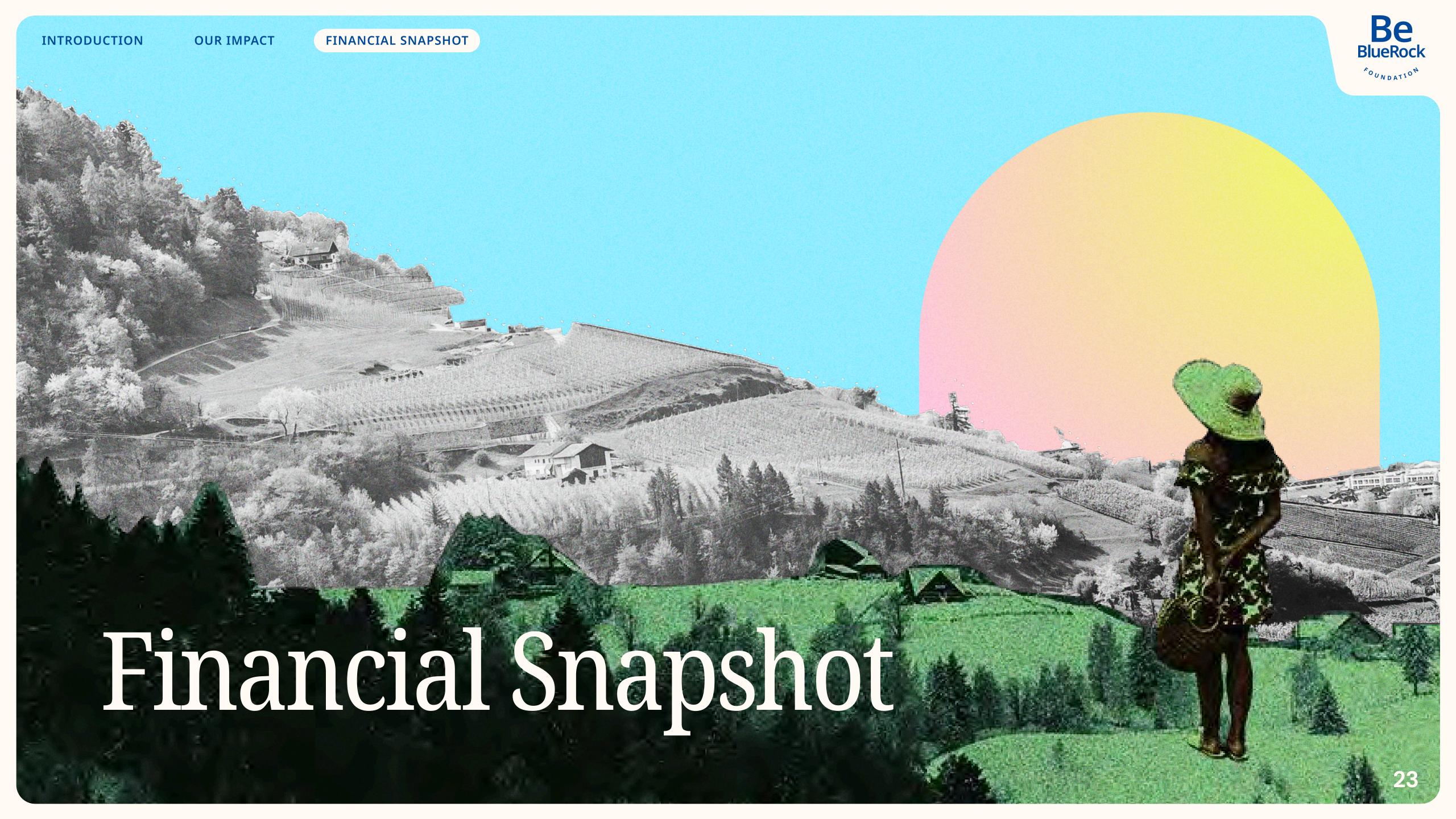
Our focus is creating safe and supported livelihoods for vulnerable people experiencing family violence and/or homelessness.

Domestic violence is the single biggest cause of homelessness in Australia. It can include physical, sexual, emotional, social, verbal, spiritual and economic abuse. Recent research (ABS 2023) says 2 in 5 Australians have experienced physical or sexual violence. Family violence is a significant cause of homelessness and financial hardship. BlueRock is still committed to improving financial literacy for greater future security, economic stability and social inclusion for all.



One of the greatest challenges of our time is arguably climate change.

Facing the climate crisis, our focus is supporting climate action to protect nature.
Environmental issues include disaster relief, climate change, carbon emissions, pollution, degradation and overuse of natural resources.
Climate change poses a major global challenge, leaving the poor and vulnerable hit first and worst. Our aim is to protect the environment and build a more sustainable world for future generations.



INTRODUCTION OUR IMPACT

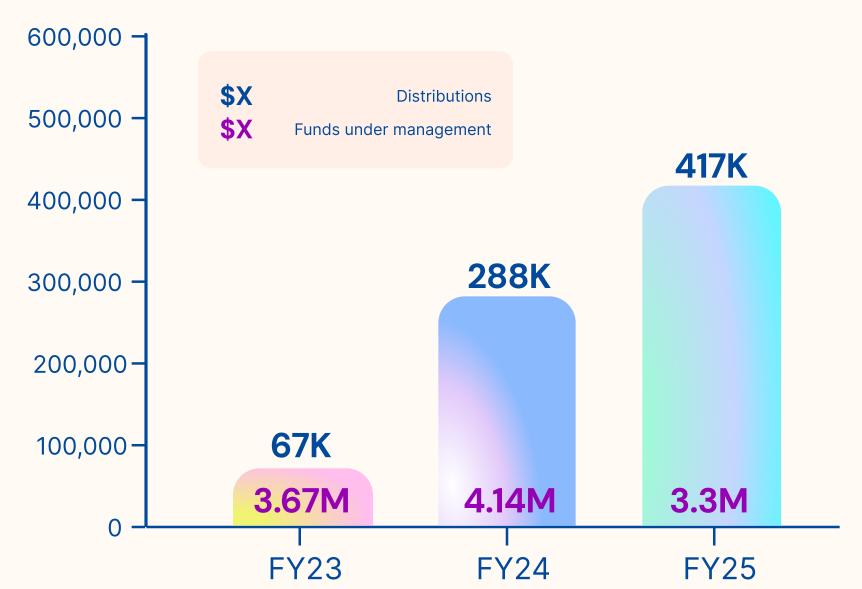
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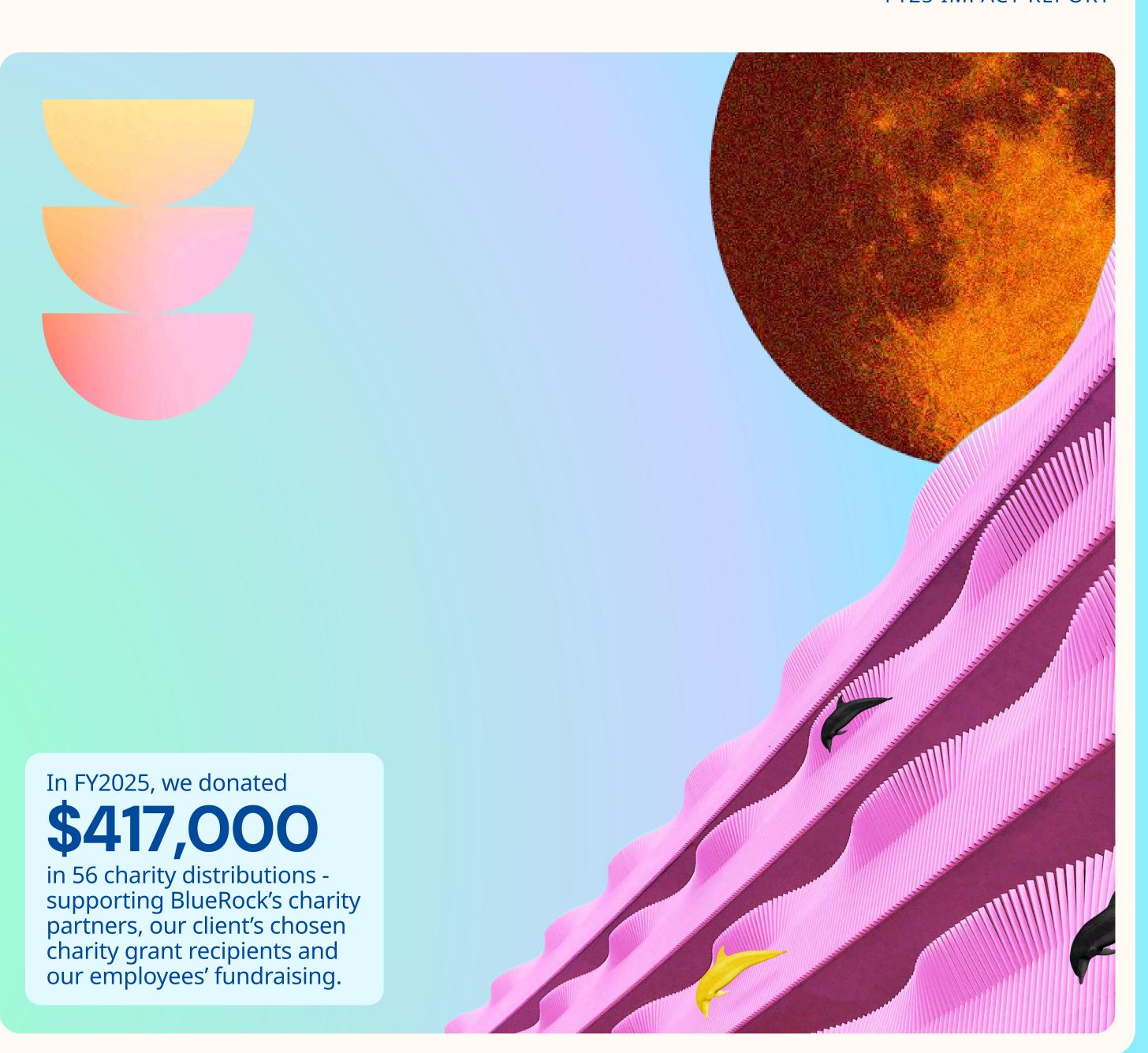
Growing Our Giving Our Giving Impact in Numbers

Total Giving (charity distributions made since est. in 2020):

\$855,394

Charity Distributions Year on Year (\$):





Growing Our Giving Our Finances

Thank you to all our BlueRock employees and philanthropy clients for growing their giving in line with the government and sector goal to double charity giving by 2030.

We are committed to strong transparency and accountability and publish our full audited financials on our Foundation's charity listing. Audited Financial statements are available on <u>our ACNC listing</u>.

