

Be
BlueRock
FOUNDATION

FY2026 Impact Report

BE BLUEROCK FOUNDATION



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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

As we reflect on FY2026, we are proud to have distributed almost half a million dollars to charities during the year. We also celebrated an important milestone, surpassing \$1,000,000 in total distributions to charities since the Foundation's establishment in 2020. The first million takes the longest, and we look forward to celebrating the second and beyond. This result reflects the generosity of our donors, the commitment of our partners, and the growing appetite for philanthropy despite a challenging economic environment for both businesses and charities.

This year also marked the launch of our new BlueRock Giving Strategy, with employees selecting the three cause areas and payroll giving donors choosing the three charity partners.

It's been encouraging to see clients continue to grow their giving funds and deepen their impact through their philanthropy.

Across the year, we were proud to support a range of fundraising and community initiatives, including the BlueRock Open Golf Day, People's Gala, Bake Sale, Biggest Morning Tea, volunteer days, giving strategy workshops, and more.

We would like to acknowledge and thank founding Board Member Jo Stanlake, whose contribution was integral to establishing the BlueRock Foundation and guiding its growth from startup phase to the strong vehicle it is today. Jo's vision, expertise, and passion for philanthropy shaped the Foundation's strategy, brand, website, and philanthropy service. We are also grateful to Gemma Wu, whose leadership of our marketing efforts through the employee committee, Taskforce, helped share the positive impact being made across the sector and inspired many to take action.

Looking ahead, we remain committed to inspiring more philanthropy, serving our philanthropic giving fund clients and their causes, and growing our giving.

It was my first year serving on the Be BlueRock Foundation Board, and I am proud to be part of a group that is inspiring others to take action for the community. We are immensely proud of the different ways BlueRock has been able to help the community through treasure (the provision of grants and premium office space), employee time, talent, ties and testimonials. We look forward to backing the changemakers making a difference in the year ahead.

George Botros

on behalf of the
Be BlueRock Foundation Board Members



George Botros

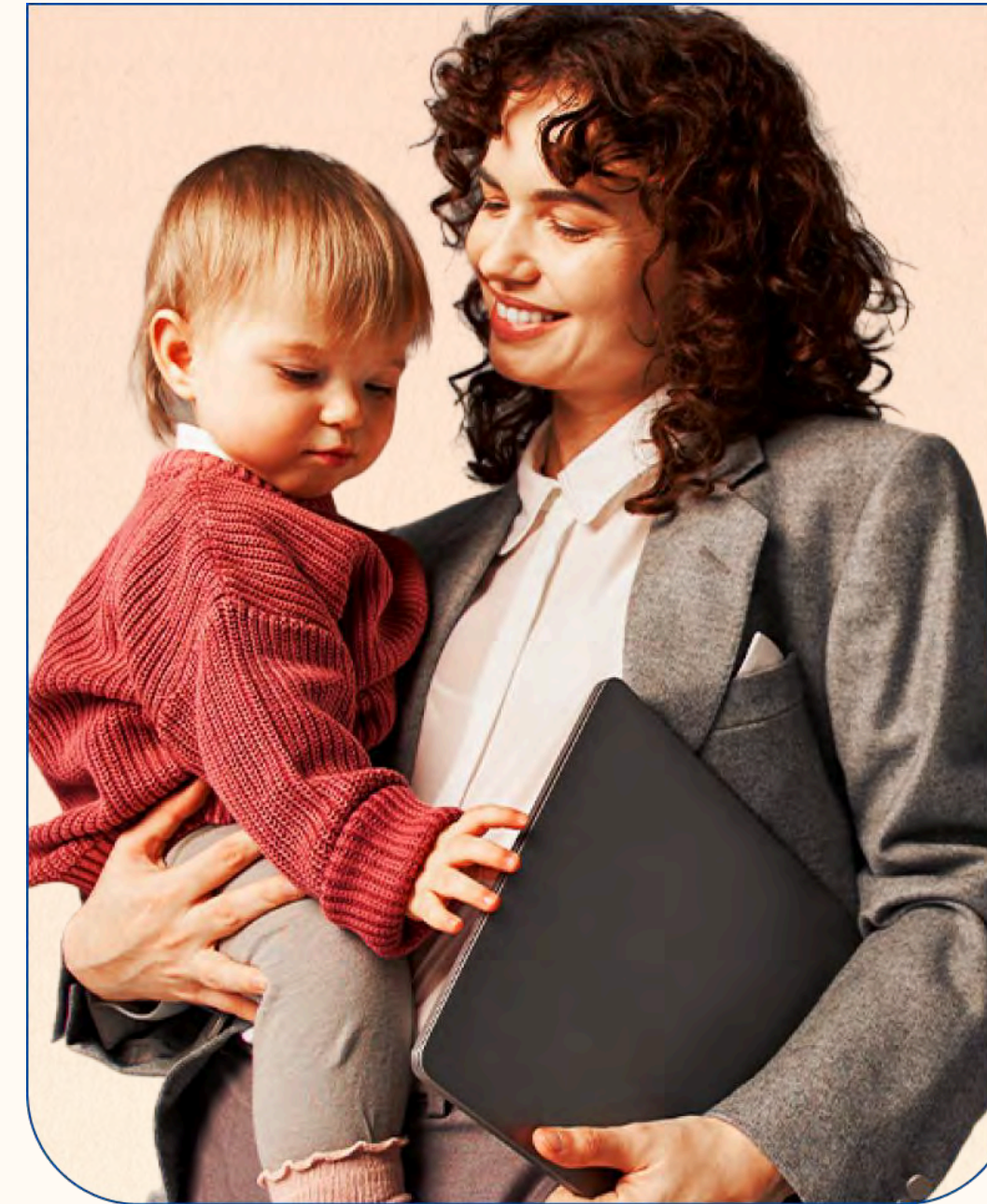
Be BlueRock Foundation Board Member &
BlueRock Law Director

Vision, Mission, 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 |
Accounting



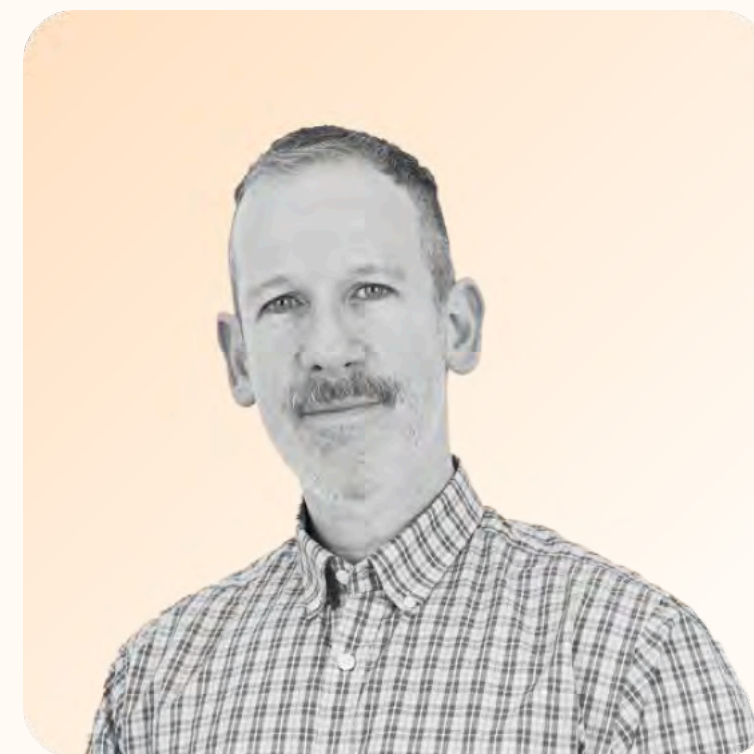
JAMIE KING
Board Member
Executive Managing
Partner | Finance



LYLE MEANEY
Board Member
Advisory Board Member



JO STANLAKE
Board Member
(Outgoing)



WAYNE GREEN
Board Member
Philanthropy Specialist



GEORGE BOTROS
Board Member
Director | Law



ISHARA FERNANDO
Secretariat of
Be BlueRock Foundation
Philanthropy and
Impact Manager



HARRY LALOR
Foundation Coordinator
(Secondment)

Our People

Charitable Taskforce



TIEN DO
Director | Accounting



LEE KIRBY
Director | Accounting



AIDAN LONG
Director | Accounting



SEAMUS FLAGG
Investment Advisor |
Wealth



GEMMA WU
Marketing Coordinator
(Outgoing)



ETHAN LIM
Accountant | Accounting



Our Impact

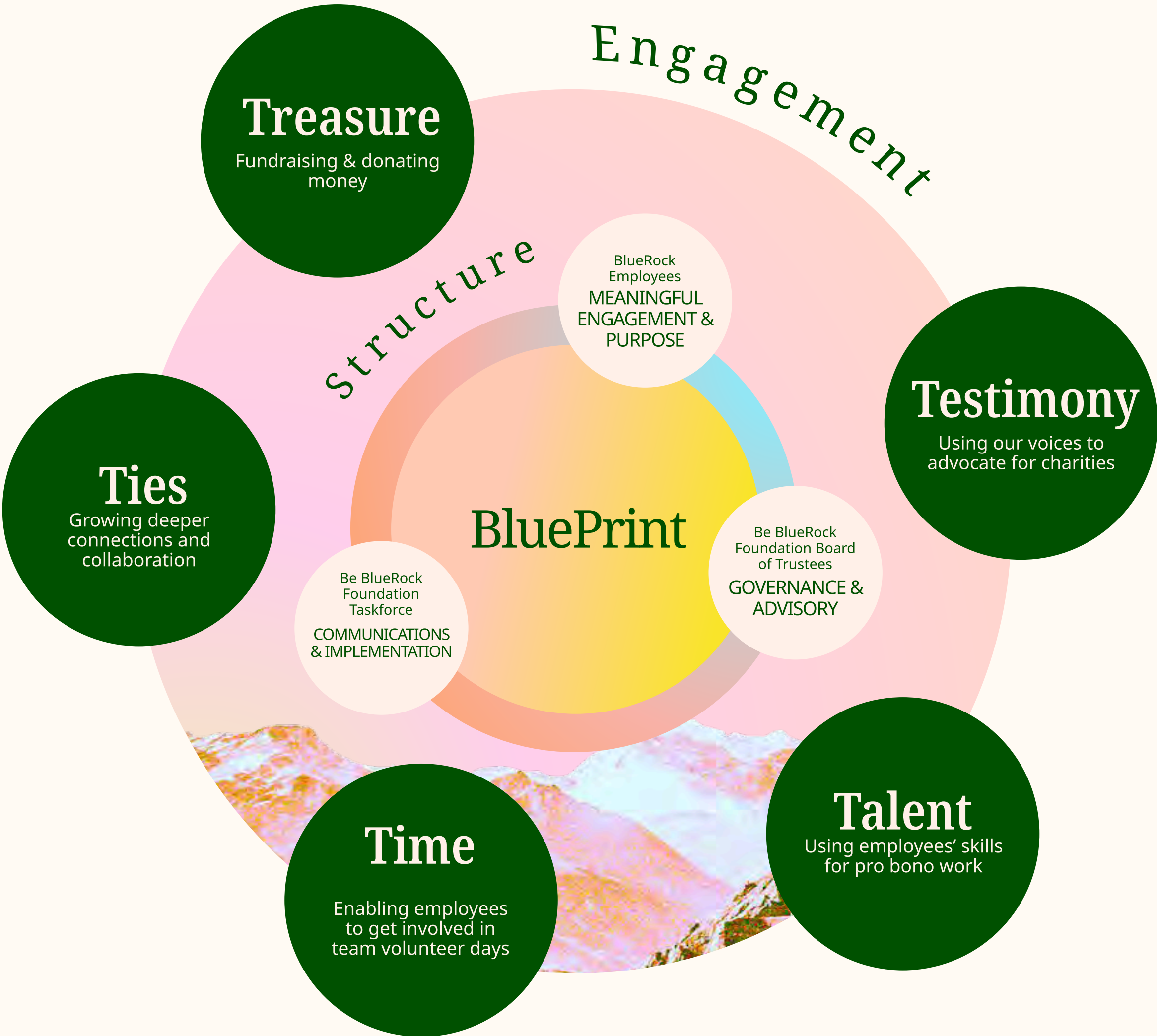
Our Giving Blueprint

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.



Time

1,500

Volunteer & Pro Bono Hours

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



Thank you so much for volunteering for Daffodil Day 2025! Again, you brought so much energy and joy to the event and you're always so lovely, committed and hard working.
CANCER COUNCIL VICTORIA,
DAFFODIL DAY, AUGUST 2025



We are so proud of BlueRockers volunteering for Reclink's Community Cup each June in the midst of winter serving cold drinks behind the bar. Particularly for giving up their hard-earned Sunday, so close to 30 June to help less fortunate members of the community is awesome.

RECLINK COMMUNITY CUP, JUNE 2026



Talent

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

HATCH Accelerator Program to protect our planet - BlueRock delivered the Pro Bono Finance Workshop for the 4th time

It’s been a pleasure to take part in the HATCH Accelerator Program for the fourth year running, and to deliver the session alongside Rhys this year. It was great to see the founders’ growing understanding of the finance side of start-ups and see their thoughtful engagement throughout the workshop. Tien and I also attended the Pitch Night at Taronga Zoo, which was a fantastic experience. It was great to meet the founders, hear more about their journeys and what inspired them to start their own enterprises. Glad to be a small part of a rewarding initiative!

Anuki Wijerama
BlueRock Senior 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.

Our partnership with TFN is one that is so rewarding, and personally fills my cup (overflowing!). I am grateful that there are so many individuals in our community that are happy to engage and contribute their time to each round of charity reviews. How's the power of community?

Tien Do
BlueRock Accounting Director

Left Write Hook Pro Bono Accounting Work

With just a few hours of accounting pro bono work, we were able to help the impactful charity Left Write Hook... Here’s what they had to say:

“I wanted to take a moment to share some updates and extend my gratitude. I recently had the chance to work with Shu Zen and Zara, who completed the financial budgeting and forecasting for Left Write Hook (as of this afternoon!!!). I can’t thank you enough for facilitating this support. Both of them were absolutely fantastic—genuinely kind, incredibly professional, and so sharp.

They created an intricate yet user-friendly Excel spreadsheet that’s already proving to be a game-changer for us (I just met with our accounts person and showed them). It’s set us up in ways I couldn’t have imagined. The foundation they’ve built is just outstanding.

Please pass on my heartfelt thanks to the broader BlueRock Foundation network. This kind of pro bono support is transformative for small organisations like ours. It means so much.

Thank you again for everything you’re doing to uplift the community.”

Donna Lyon
CEO and Founder



Ties

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

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.

"At a time when more people than ever have needed support, you've continued to stand alongside us and the frontline organisations responding to homelessness across Australia. It's an example of what's possible when people come together collectively, to help others. And it gives me hope for what's ahead. Thank you."



corena



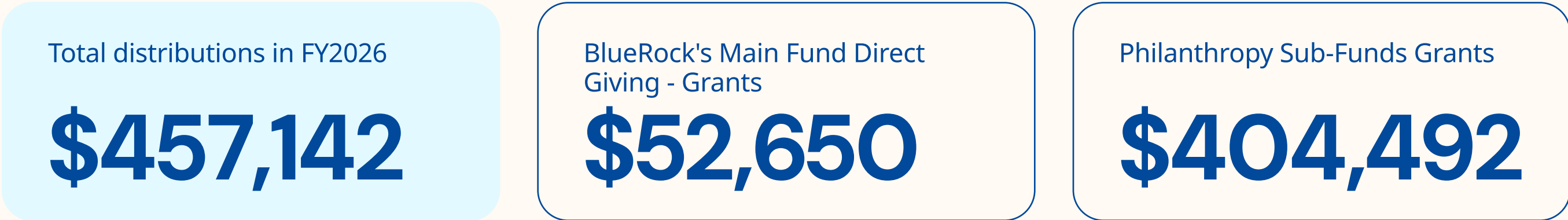
We introduced a charity to a funding opportunity where they received \$70,000+.

"Thank you so much for putting this opportunity on our radar. It hadn't been on our radar before you sent it our way - so we are so hugely appreciated of your ongoing support!"

Georgia Cooke
Chair, CORENA



Treasure



Together, these partnerships reflect BlueRock’s commitment to creating meaningful, long-term impact across mental health, vulnerable people experiencing homelessness and/or family violence and environmental sustainability. Through consistent contributions and active engagement, BlueRockers are helping drive real change — not just through funding, but through community, expertise, and action.

Real Change

- Students described feeling calmer and more in control after using **Smiling Mind** tools.
- Participants reported becoming more aware of their environmental impact and making lasting | changes to their everyday habits after taking part in **Pledge for the Planet** challenges.
- Participants reported feeling more confident entering the workforce after completing **HoMie** programs.

Beyond Multi-Year Partnerships: Extending Our Impact

The Be BlueRock Foundation also backs BlueRock employees' fundraising efforts through matched funding which included **Cancer Council, Action Aid and AusMusic** in 2025-26. Plus BlueRockers also attended and actively pledged funds at **The Funding Network** events: "Your support empowers grassroots changemakers to drive impact on their own terms, giving them the freedom and resources they need to succeed."



Events

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



People's Gala 2026



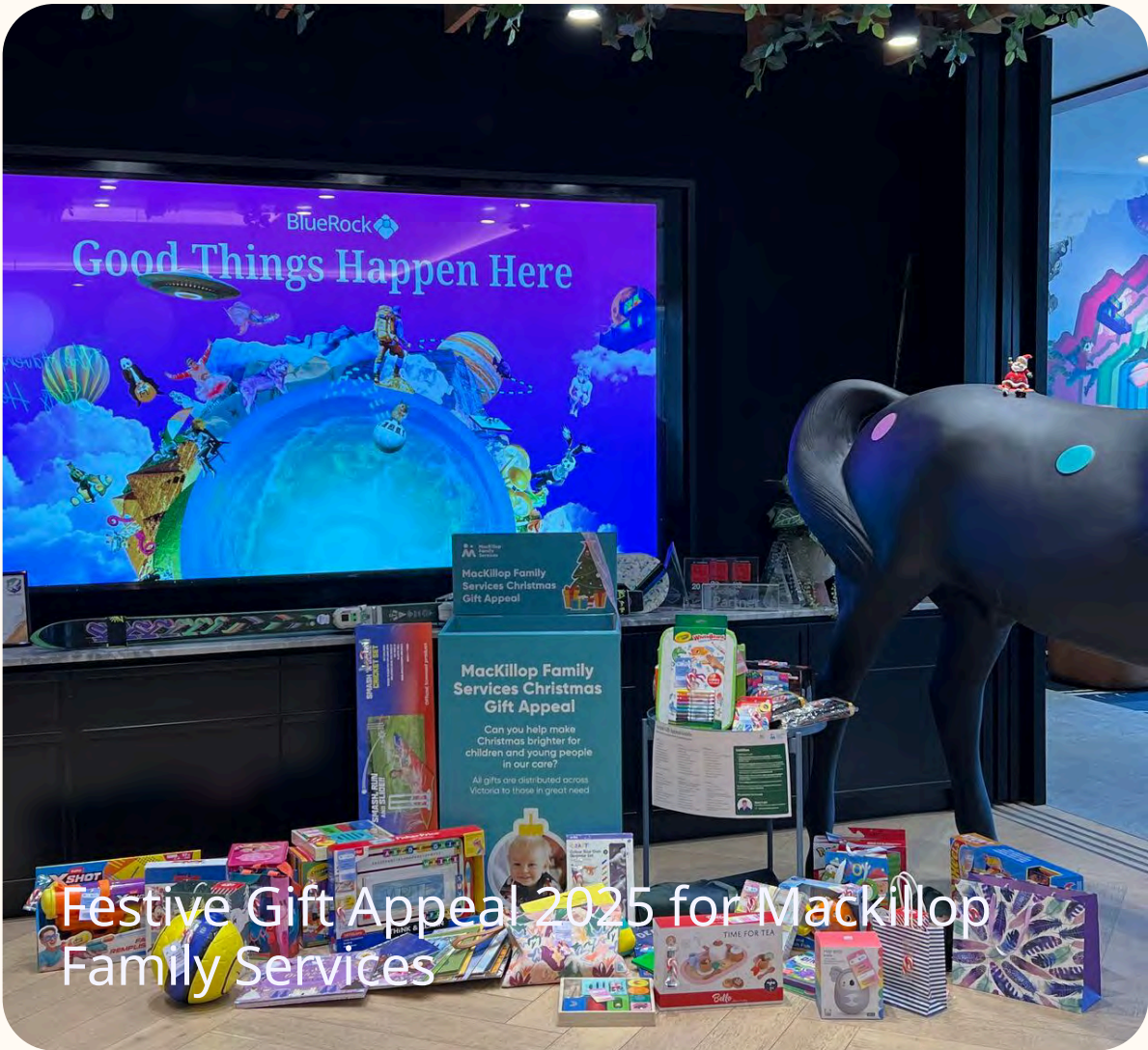
BlueRock Open Golf Day 2025



BlueRockers volunteering for Mums Supporting Families in Need 2025



People's Gala 2026



Festive Gift Appeal 2025 for Mackillop Family Services



People's Gala 2026



Edgars Mission Volunteer Day 2025



Bake Sale Fundraiser 2026

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.](#)



Philanthropy Clients' Giving

Charities Supported by Named Giving Funds
(Sub-Funds) in FY2026



Philanthropy Clients' Giving

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



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.



This year's contribution will directly support our Blue Corridors work, led by Chris Johnson, helping to protect and restore the critical ocean pathways that many marine species rely on to migrate, feed and breed. By safeguarding these "blue superhighways", we can support the long-term health of ocean ecosystems and the incredible wildlife they sustain.



Every nourishing meal we create together for someone's table means less people will reach their breaking point this winter - and there's so much hope in that. Because of your generosity, we can continue to be there for the 69,000 people who rely on Foodbank every day. Thank you for wrapping your arms around Victorians.



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."



From all of us here at the Karrkad Kanjdji Trust, and on behalf of our partners in Arnhem Land, thank you for your kind support and your donation. Our vision is that current and future generations of Bininj (Indigenous people) and Balanda (non-Indigenous people) can work together to support the sustainability of land management and cultural heritage work, while enabling the ongoing self-determination of the people of West and Central Arnhem Land.



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."

NEW

BlueRock's Giving Strategy

2025-2028

In 2026 employees voted to set a NEW Giving Strategy with three cause areas and charity partners for the next three years.



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.

NEW

BlueRock’s Charity Partners

2025-2028

In FY2026, we set a NEW Giving Strategy with BlueRock employees choosing to back these three charities in multi-year partnerships.



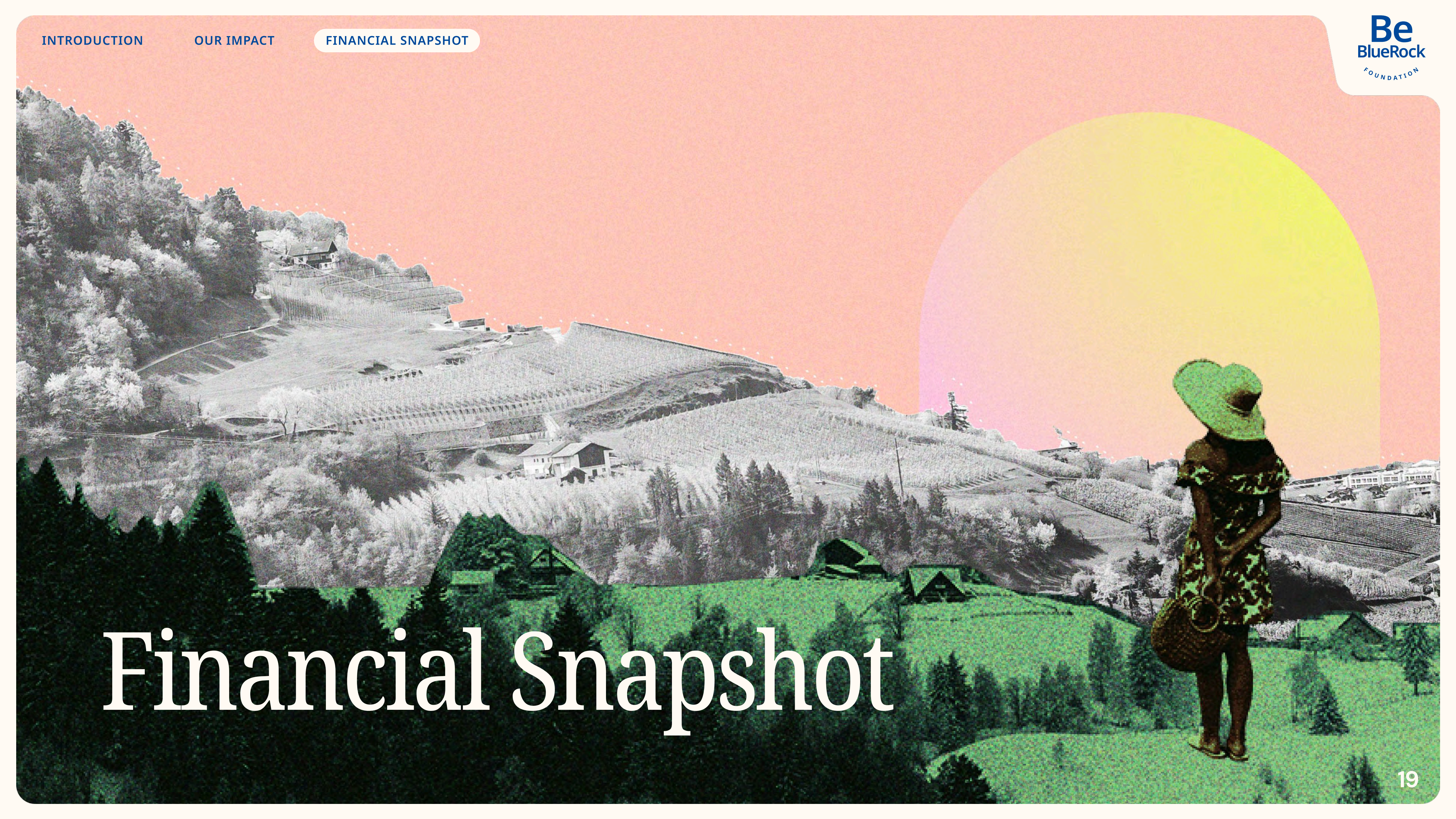
Improving Mental Health
Smiling Mind is a digital-led, mental health not-for-profit who’s been helping minds thrive with evidence-based tools and resources for over 12 years.



Helping People Affected by Family Violence or Homelessness
HoMie is a streetwear label that exists to support young people affected by homelessness or hardship.



Protecting the Environment
Pledge For The Planet is harnessing the power of sport and community to drive collective climate action.

A woman in a floral dress and wide-brimmed hat stands on a grassy hill, looking out over a valley. The background features a large, colorful sun in shades of orange, yellow, and pink, set against a dark blue sky. The landscape includes rolling hills, a small town, and a large body of water in the distance.

Financial Snapshot

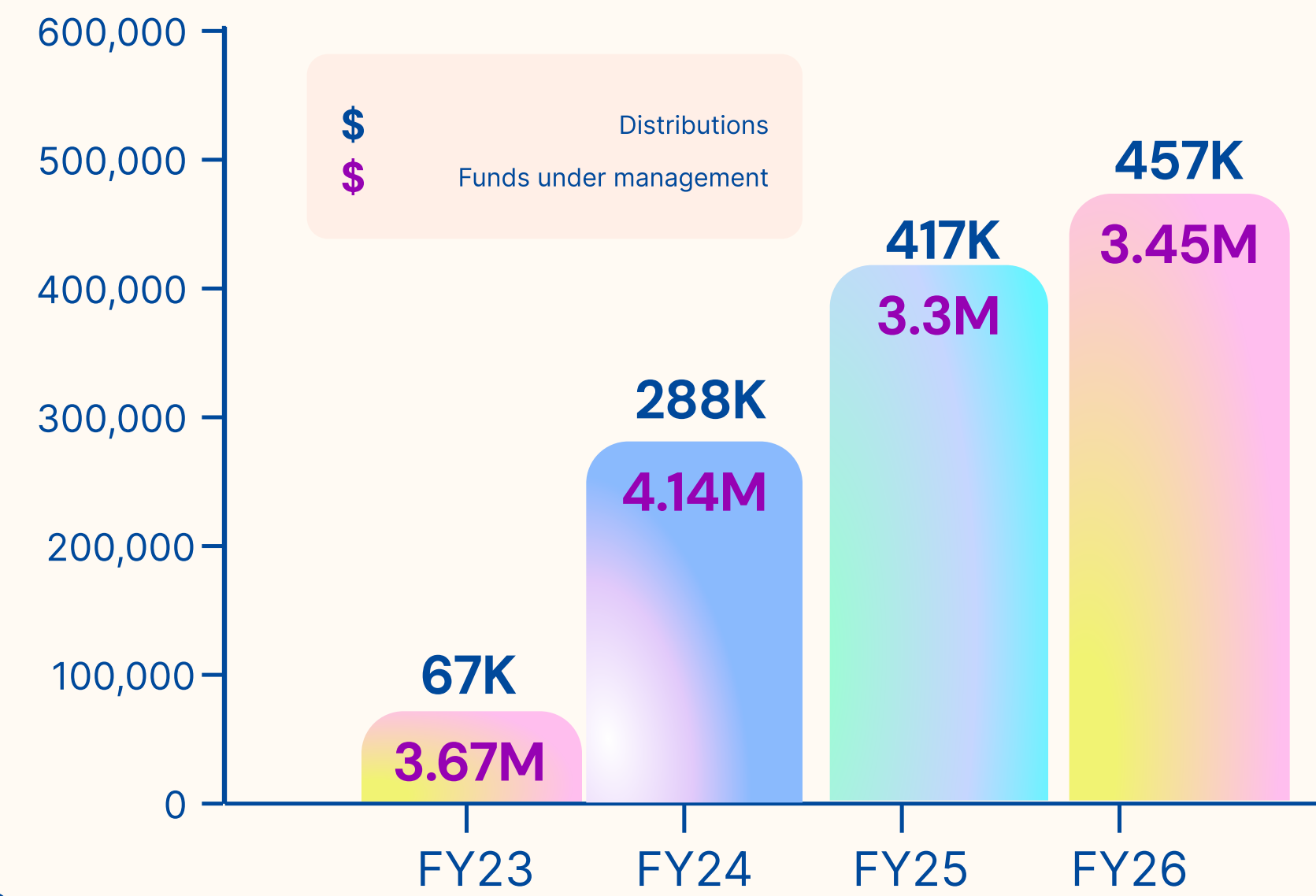
Growing Our Giving

Impact in Numbers

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

\$1,312,536

Charity Distributions Year on Year (\$):



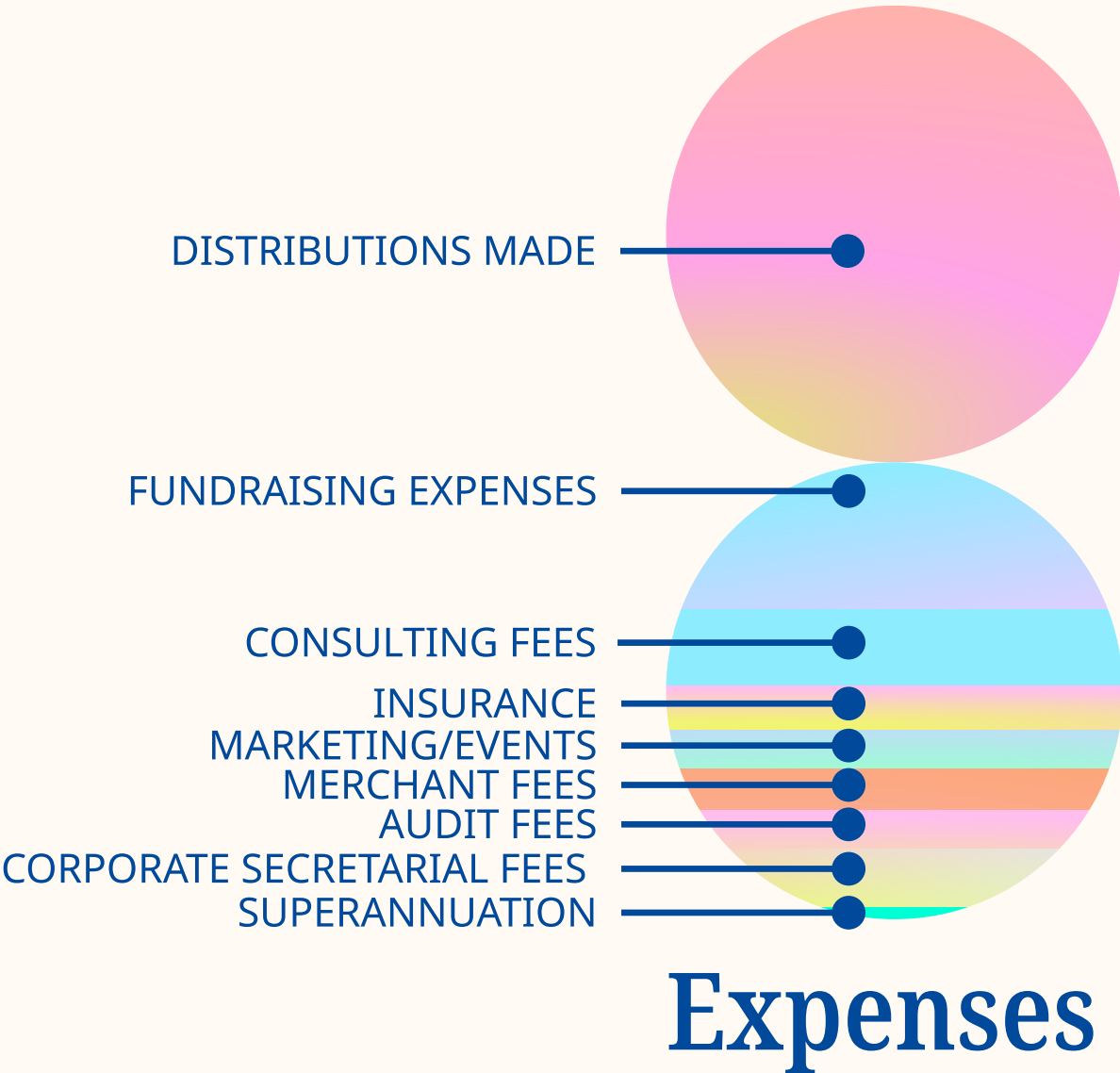
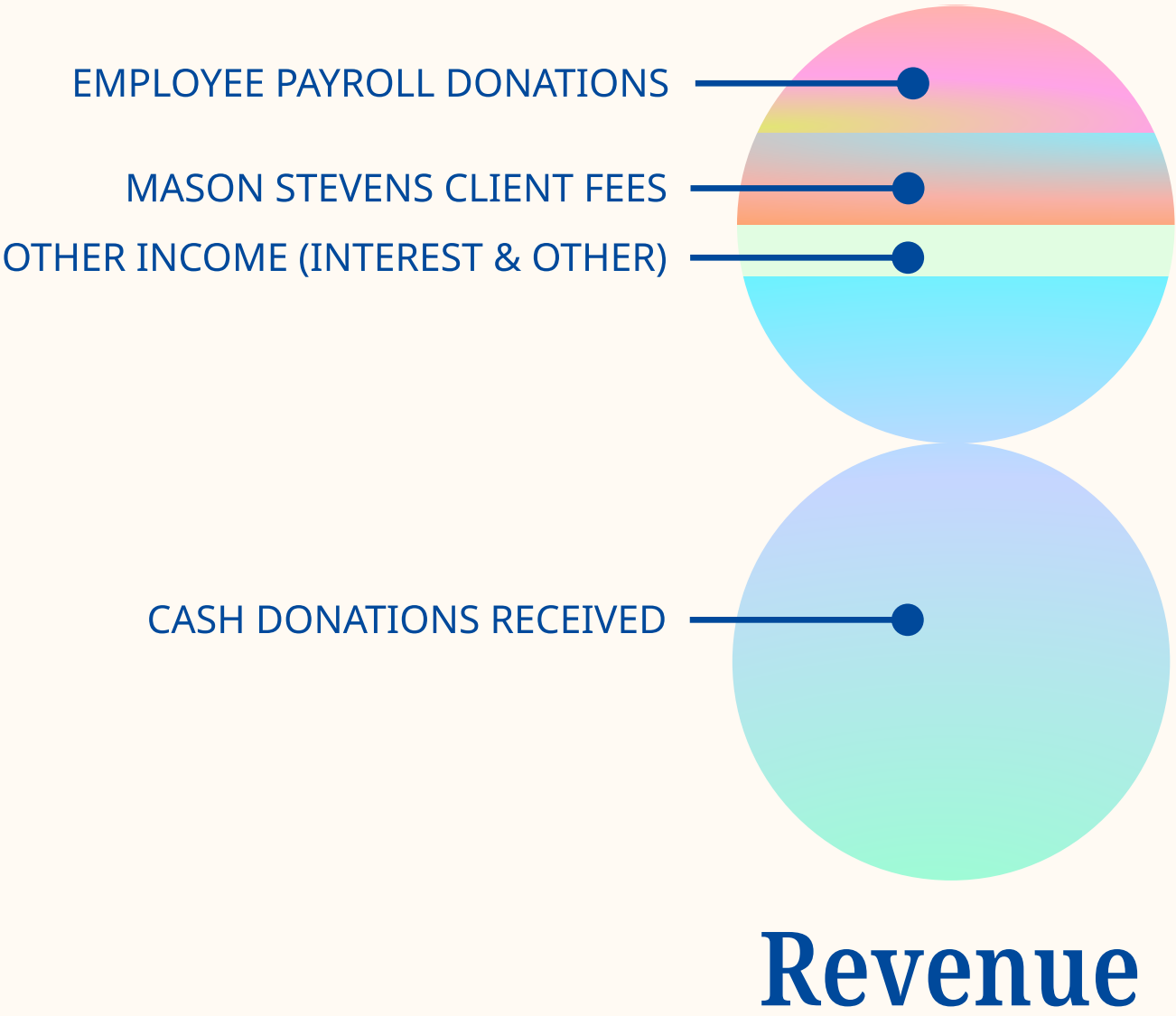
In FY2026, we donated
\$457,142
in 50 charity distributions - supporting BlueRock’s charity partners, our client’s chosen charity grant recipients and our employees’ fundraising.

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 [our ACNC listing](#).



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Good Things e-newsletter.

Simply fill out the form and tick the box
'Be BlueRock Foundation' under the
Philanthropy & Impact heading

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