



# Foundation Newsletter

2024



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## Foundation Highlights in 2024

**With a strong focus on mental health, education and social inclusion, Shaw and Partners is committed to driving positive change and empowering communities.**

### \$12,378,450

Shaw and Partners has donated over \$12 million to charity since the Foundation's inception in 2015.

### \$520,000

In 2024, over \$500,000 was donated to 41 charities during the Shaw and Partners Foundation Week

### \$2,964,750

In 2024, the Shaw and Partners Foundation donated over \$2.9 million to more than 90 charities.

### 1,200

Every year, advisers and staff members at Shaw and Partners collectively contribute 1,200 hours to volunteering efforts.

### \$763,076

In 2024, Shaw and Partners donated over \$760,000 to charities supporting mental health well-being.

### 510

Since 2015, Shaw and Partners has extended its support to more than 500 philanthropic projects.

### 302

Over the past nine years, Shaw and Partners has provided assistance to more than 300 different charities.

### \$611,000

Over \$600,000 was raised during the 2024 Shaw and Partners Institutional Foundation Day.



**Our pledge:** By its 15-year anniversary in 2030, the Shaw and Partners Foundation is committed to raising and donating \$20 million to support Australian charities.

I want to extend my sincerest gratitude to each and every one of you who contributed your time, money, energy, and generosity to the Shaw and Partners Foundation in 2024. Your dedication to giving back continues to inspire me.

Shaw and Partners



Shaw and Partners  
FOUNDATION

**RUSSELL KARLSON**

Shaw and Partners  
Foundation Chair



# Shaw and Partners FOUNDATION

## A message from the Foundation Chair

As Chair of the Shaw and Partners Foundation, I am proud to reflect on another record-breaking year of giving in 2024. With over \$2.9 million donated to more than 90 inspiring charities across Australia, we continue to make a lasting impact in our communities.

This year marked our ninth year of supporting advisers and staff in fundraising, volunteering, and contributing to charities in their local areas. Since our inception, we have donated over \$12 million to more than 300 charities—a testament to the generosity and dedication of everyone involved.

Our Institutional Equities Team once again led by example, giving up a day's brokerage for charity during the annual Institutional Foundation Day. This initiative raised an extraordinary \$611,000, benefiting the Sydney Children's Hospitals Foundation and the Australian Fund Manager Foundation. A heartfelt thank you to our institutional clients who support this initiative year after year.

Our corporate partnerships allowed us to engage in meaningful community initiatives. We were proud to sponsor the Manly Warringah Sea Eagles' Gotcha4Life Cup, which raised \$200,000 to promote mental fitness and emotional resilience. Additionally, our continued support of the Sydney Children's Hospitals Foundation as the presenting partner of Gold Dinner 2024 helped achieve a record \$33.4 million in funds raised for critical paediatric healthcare services.

Our offices nationwide remained deeply engaged in charitable work throughout the year. In Perth, our team played a significant role in the Heartbreak to Hope Walk, raising over \$36,000 for the Redkite Foundation, while Perth Senior Private Wealth Adviser Jenny Rachmat took the plunge off the Central Park building, raising over \$18,000 for Variety – the Children's Charity.

The Brisbane office got behind State Manager Colin McKenzie, as he shaved off his long locks, raising \$15,000 for the Leukaemia Foundation.

Our Adelaide team is always giving back, and this year was no exception. David Dall rode through the Barossa for JDRF Australia, raising \$10,000. State Manager Fraser MacLeod ran the New York Marathon, raising \$10,000 for Breakthrough Mental Health Charity, and it wouldn't be a fundraising year in Adelaide without the team supporting Suzie Georgiou's Team Dot in

the Bloody Long Walk, raising \$40,700 for the Mito Foundation. We have now donated over \$188,000 to the Mito Foundation.

Meanwhile, our Melbourne, Sydney, and Canberra offices also demonstrated extraordinary commitment to philanthropy. In Melbourne, the team embraced the Foundation Week spirit by making donations to several worthy charities, including The Male Hug, Fight Parkinson's, and Fitted for Work, to name a few.

Aside from the record-breaking Gold Dinner fundraiser, our Sydney office actively supported Australia's Biggest Morning Tea, raising \$24,560 for Cancer Council Australia. They ran the City2Surf, raising over \$50,000 on the way to Bondi Beach, and supported International Women's Day with a \$25,000 donation to The Warrior Woman Foundation.

Lastly, our Canberra office did not disappoint, with a huge \$200,000 donation to the Ricky Stuart Foundation and \$15,000 donated to Win the Day, among others.

Our anniversary celebrations brought another exciting milestone—the launch of Foundation Week, during which the Shaw and Partners Foundation donated \$520,000 to over 40 charities nationwide. This initiative further demonstrated our commitment to strengthening the fabric of Australian society through philanthropy.

All these incredible achievements were made possible by the unwavering support of our advisers, staff, and partners. I want to extend my sincerest gratitude to each and every one of you who contributed your time, money, energy, and generosity to our Foundation in 2024. Your dedication to giving back continues to inspire me, and I look forward to what we can achieve together in the year ahead.

It is impossible to recognise all the activity and donations made in this introduction, so enjoy reading about our incredible year of giving in 2024—a milestone year for the Shaw and Partners Foundation.

Have fun. Live life. Give back.



**Russell Karlson**  
Chair, Shaw and Partners Foundation



FEB 2024



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## Shaw and Partners donates \$200,000 to the Ricky Stuart Foundation’s inaugural Legends Lunch

On Friday, 9 February 2024, Shaw and Partners proudly partnered with The Ricky Stuart Foundation for its inaugural Legends Lunch at Doltone House in Sydney. The event brought together 400 attendees, including high-profile media figures and sporting personalities, to support the development of the Autism Awareness in Schools Education Program.

Shaw and Partners was well represented, with over 20 advisers and staff members attending the event. A key highlight of the day was hearing from Ash Barty, former world No. 1 tennis champion and three-time Grand Slam winner, who shared insights into her journey both on and off the court.

Most importantly, the event was a tremendous success, raising over \$570,000 to further the foundation’s vital work in autism awareness and education. The Shaw and Partners

Foundation played a significant role in this achievement, making an initial donation of \$100,000 and then doubling its contribution by matching four additional donations, bringing the total to \$200,000.

Founded in 2011 by Ricky and Kaylie Stuart, The Ricky Stuart Foundation was inspired by their personal journey raising a daughter with autism. Their dedication has led to remarkable initiatives that provide essential resources and support for families and communities.

A special congratulations to Stephen Johnston, Shaw and Partners ACT State Manager, for his efforts in driving this initiative alongside Ricky’s team. It was an inspiring day that underscored the power of collaboration and philanthropy in making a lasting impact.

# \$200,000

**DONATED TO THE RICKY STUART FOUNDATION**



1. Shaw and Partners Sydney staff members and advisers attending the inaugural Legends Lunch in support of the Ricky Stuart Foundation.
2. Shaw and Partners Co-CEOs Earl Evans and Allan Zion with Ash Barty and Ricky Stuart at the Legends Lunch.
3. Shaw and Partners Co-CEO Earl Evans presenting a donation to Ricky Stuart in support of the Ricky Stuart Foundation.
4. Shaw and Partners was well represented at the inaugural Legends Lunch, with two dedicated tables in attendance.





## Riding & racing for a cause: Shaw and Partners supports Diabetes and Fragile X Research

### David Dall completes a 160km Ride for JDRF Australia, raising over \$10,000

On Saturday, 10 February 2024, Shaw and Partners Adelaide Senior Investment Adviser David Dall took on the challenge of a 160km grand tour bike ride through the Barossa Valley as part of the JDRF Australia One Ride – a premier cycling event dedicated to raising funds for type 1 diabetes research.

David successfully raised over \$10,000 for JDRF Australia, the world’s largest funder of type 1 diabetes research. To support his incredible effort, the Shaw and Partners Foundation contributed \$3,000, boosting his fundraising total even further.

David’s dedication and commitment to this cause were truly inspiring, and his ride through the stunning Barossa landscape helped raise critical funds for vital diabetes research.

**\$10,035**

**DONATED TO JDRF AUSTRALIA**

### Shaw and Partners donates \$10,500 to Fragile X Association

On Sunday, 18 February 2024, the Shaw and Partners Australian Ocean Racing Series (AORS) kicked off in Sydney with the Manly Wharf Bridge to Beach event, bringing together over 350 paddlers for an iconic race across Sydney Harbour.

As part of its commitment to giving back, Shaw and Partners pledged to match every dollar donated to the Fragile X Association of Australia during the event. Thanks to the generosity of participants and supporters, a total of \$29,000 was raised, including a \$5,000 contribution from the Shaw and Partners Foundation and an additional \$5,500 from Shaw and Partners advisers and staff members.

The Fragile X Association of Australia supports individuals and families affected by Fragile X syndrome, a genetic condition that leads to intellectual disability and learning challenges. The funds raised will help provide essential resources, advocacy, and support to those impacted.

**\$10,500**

**DONATED TO FRAGILE X ASSOCIATION**





## Shaw and Partners celebrates nine years of giving with a new Foundation Newsletter

In March 2024, Shaw and Partners proudly released a new edition of the Foundation Newsletter, marking nine years of giving and impact across all offices. This milestone was met with celebrations across the firm, as teams came together to reflect on the incredible journey of generosity, collaboration, and community support.

At the time of publication, the Shaw and Partners Foundation had donated an extraordinary \$9.4 million to charities across Australia. This achievement reinforced its mission to support initiatives focused on mental health, education, and social inclusion, driving meaningful and lasting change.

Throughout the year, the Shaw and Partners team united through cycling, running, swimming, paddling, and even overnight baking, contributing to various fundraising initiatives. These collective

efforts strengthened communities and provided crucial support where it was needed most.

The celebrations were not only a reflection of past success but also a reminder of the power of collective action.

**A heartfelt thank you to our Board, Advisers, and Staff Members — your passion and generosity continue to drive the Foundation's success.**

Together, we look forward to building on this legacy and making an even greater impact in the years ahead.



**\$9,413,700**  
DONATED TO CHARITY SINCE 2015









# Shaw and FOUND



Over 300 charities s





MISSION AUSTRALIA | together we stand



# Partners FOUNDATION



supported since 2015





# Institutional Foundation Day!

## Shaw and Partners Institutional Foundation Day raised a record-breaking \$611,000 for charity.

**On 22 March 2024, the Shaw and Partners Institutional Team set a new benchmark in philanthropic giving, raising an extraordinary \$511,000 during the annual Institutional Foundation Day.**

This initiative, where all brokerage fees from institutional trades on a designated day are donated to charity, remains one of the firm's most impactful efforts to date.

The record-breaking amount raised was further boosted by an additional \$100,000 contribution from Shaw and Partners Co-CEOs, Earl Evans and Allan Zion, bringing the total donation to \$611,000—the highest amount ever raised in the event's history.

This year, funds were evenly distributed between the Sydney Children's Hospitals Foundation and the Australian Fund Manager Foundation, reinforcing Shaw and Partners' commitment to supporting critical healthcare and community initiatives.

Anthony Wilson, Head of Equities at Shaw and Partners, who has led the initiative for the past three years, expressed his gratitude, stating:

"Shaw and Partners is honoured to provide a platform for pooling resources within the Australian Financial Services industry. The Australian Fund Managers Foundation, one of our beneficiaries, supports a broad range of charities, including Odyssey House NSW, Mirabel Foundation, Reach Foundation, Life Ed, Katrina Dawson Foundation, Children's Cancer Institute, and the GO Foundation."

Since its inception in 2016, the Shaw and Partners Institutional Foundation Day has raised over \$2.6 million, establishing itself as one of the few initiatives in Australia where an entire day's institutional revenue is donated to charity.

A special thank you goes to the top 10 institutional supporters, including Wilson Asset Management, Milford, Pental Group, Regal, Colonial First State, L1, Firetrail, Antares, Tyndall, and 1851. Their continued generosity has been instrumental in making this initiative a success.

A heartfelt congratulations to Anthony Wilson and the Institutional team, along with the Corporate and Research departments, for their dedication and commitment to making this event a success. Their collective efforts have been instrumental in driving the impact of Institutional Foundation Day and supporting important charitable causes.

Shaw and Partners remains deeply committed to supporting Australian charities in mental health, education, and social inclusion, ensuring that vital funding reaches the organisations that need it most.

**All brokerage fees generated from institutional trades on a designated day are donated to charity.**

### Institutional Foundation Day's impact over the years

\$611,000 raised in 2024

\$265,532 raised in 2023

\$378,811 raised in 2021

\$377,000 raised in 2020

\$200,000 raised in 2019

\$504,898 raised in 2018

\$241,983 raised in 2017

\$109,398 raised in 2016

# \$2,688,622

**RAISED DURING INSTITUTIONAL FOUNDATION DAY SINCE 2016**



Smiley faces for the Shaw and Partners Institutional Dealing Team. From left: Christineh Grigorian, Christopher Dorney, Michael Stanford, Michael De Palma, Mark Hardman, Anthony Wilson (Head of Equities), Paul Johnston, Sam Christie and Edward Walker



We Want You!! Paul Johnston calling all Shaw and Partners Institutional clients



Mark Hardman celebrating another successful Institutional Foundation Day



Anthony Wilson (left) presenting a \$305,500 donation on stage at the Australian Fund Manager Awards



# Shaw and Partners

an FFC company



## Shaw and Partners celebrates International Women's Day with The Warrior Woman Foundation

**On 8 March 2024, Shaw and Partners had the honour of hosting Jessica Brown, founder of The Warrior Woman Foundation, as part of our International Women's Day celebrations.**

Colleagues from across our offices joined – both in person and virtually – to hear Jessica's inspiring story and her dedication to empowering young Australian women.

Founded in February 2020, The Warrior Woman Foundation provides evidence-based support programs for vulnerable young women aged 17–25+ who lack the necessary familial or community support to become resilient and independent. Jessica's work has transformed the lives of hundreds of teenage girls across NSW and VIC, helping them build brighter futures.

Shaw and Partners is proud to support remarkable women making a difference in our communities. In recognition of Jessica's outstanding work, the firm's \$5,000 donation was multiplied by five, resulting in a total contribution of \$25,000 to The Warrior Woman Foundation.

**We extend our deepest gratitude to Jessica Brown for sharing her journey and for the life-changing impact she continues to make.**

From all of us at Shaw and Partners, Happy International Women's Day!

# \$25,000

**DONATED TO THE WARRIOR WOMAN FOUNDATION**

- From left: Amanda Graham, Jessica Brown (founder of The Warrior Woman Foundation), Angela Holstein, and Brittany Hughes celebrate International Women's Day with a \$25,000 donation to The Warrior Woman Foundation, reinforcing Shaw and Partners' commitment to supporting women's empowerment and community initiatives.



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APR 2024



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## Shaw and Partners braves the shave, raising critical funds for the Leukaemia Foundation

**On 5 April 2024, the Shaw and Partners Brisbane office proudly hosted Shane Rayson from the Leukaemia Foundation in support of this year's World's Greatest Shave.**

The event brought colleagues together to raise awareness and funds for Australians affected by blood cancer.

Leading the charge was Colin McKenzie, who took on the challenge and shaved his head for this important cause. Over two weeks, Colin raised an impressive \$15,000, with generous contributions from Shaw and Partners Co-CEOs Earl Evans and Allan Zion, who donated \$5,000, and an additional \$5,000 from the Shaw and Partners Foundation.

The Leukaemia Foundation has been supporting Australians with blood cancer for 50 years, providing emotional and practical support to patients and their families. With over 135,000 Australians currently living with blood cancer, the Foundation funds cutting-edge research,

life-saving new treatments, and rapid access to clinical trials, helping to improve outcomes and work toward a future free from blood cancer.

Shaw and Partners is proud to support initiatives that make a meaningful difference in people's lives.

**A big congratulations to Colin McKenzie for his incredible fundraising efforts and to the entire Brisbane office for coming together in support of this vital cause.**

For more information or to support the Leukaemia Foundation, visit [www.leukaemia.org.au](http://www.leukaemia.org.au).

**\$15,000**

**DONATED TO THE LEUKAEMIA FOUNDATION**

- Shane Rayson (left) and Colin McKenzie at the Shaw and Partners Brisbane office, supporting the World's Greatest Shave in aid of the Leukaemia Foundation.
- Colin McKenzie bravely shaves his head for the World's Greatest Shave, with Sarah Coulthard helping to make it happen. This inspiring initiative raised vital funds to support Australians affected by blood cancer.



MAY 2024

SEP 2024



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## Shaw and Partners is making a difference one event at a time, supporting communities in need

### Shaw and Partners Supports Telethon7 Leeuwin Lunch to Help Children and Families in Need

On Sunday, 26 May 2024, Shaw and Partners proudly contributed \$10,000 to the Telethon7 Leeuwin Lunch at the stunning Leeuwin Estate in Margaret River. The event raised an extraordinary \$5.7 million to support children and families facing significant health challenges.

The event was attended by Shaw and Partners Foundation Chair, Russell Karlson, who represented the firm's ongoing commitment to philanthropy and community support.

A highlight of the day was hearing Rommel Niblett share the deeply moving story of his son, Bodhi, who was born with hypoxic ischemic encephalopathy, a condition affecting his ability to walk, talk, and eat.

His words served as a powerful reminder of the critical role Telethon plays in providing life-changing support to families in need.

Shaw and Partners is honoured to stand alongside Telethon7 in its mission to fund essential medical research and services for children across Western Australia.

### Shaw and Partners Donates \$15,000 to Support Oncology Patients in Canberra

In September 2024, Shaw and Partners proudly supported the Win The Day Charity Trust at the Dare to be Rare Gala Ball in Canberra, donating \$15,000 to help improve oncology treatment access for Canberrans.

The event raised an impressive \$350,000, helping to ease the financial and emotional burden for families who must travel for cancer care. The funds will go towards providing better treatment options and resources for

those facing cancer, ensuring they receive the best possible support.

Shaw and Partners is grateful to have been part of this important initiative and extends a special thank you to Kristy Giteau and her team for their dedication to this cause. The firm remains committed to giving back to communities in need and supporting initiatives that create lasting and meaningful impact.

**\$10,000**

**DONATED TO TELETHON**

**\$15,000**

**DONATED TO THE WIN THE DAY CHARITY TRUST**





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## Shaw and Partners celebrates Stephen Thomas' 100th blood donation milestone

On 9 May 2024, Shaw and Partners proudly congratulated Stephen Thomas, affectionately known as 'Thommo', on reaching an extraordinary milestone—his 100th blood and plasma donation. This remarkable achievement highlights Stephen's unwavering dedication to saving lives and supporting those in need.

Each bag of plasma has the potential to help up to 18 different patients, including those undergoing cancer treatments, surgeries, and skin grafts after severe burns.

Shaw and Partners also recognises John Wardman, who has quietly surpassed 220 donations, an incredible testament to his own dedication to helping others. Their contributions embody the spirit of generosity and community support that Shaw and Partners holds dear.

To honour Stephen's milestone, the Shaw and Partners Foundation donated \$2,500 to his chosen charity, the

Women's & Girls' Emergency Centre (WAGEC), which provides essential support to women and children experiencing homelessness, domestic violence, and financial hardship.

**Well done, Stephen and John! Your commitment and generosity inspire us all.**



**\$2,500**

**DONATED TO THE WOMEN'S & GIRLS' EMERGENCY CENTRE**

8. A beautifully set table at the Telethon7 Leeuwin Lunch, an event dedicated to supporting children and families in need.
9. Rommel Niblett shares his family's powerful story at the Telethon7 Leeuwin Lunch, highlighting the critical impact of fundraising efforts for children's healthcare.
10. Karl Stefanovic with Shaw and Partners staff at the Dare to be Rare Gala Ball in Canberra, where he hosted as MC.
11. National Head of Private Wealth, George Deva, and Stephen Thomas celebrate 100 life-saving donations with a \$2,500 gift to WAGEC.



# Platinum Partner of Gold Dinner 2024

## Shaw and Partners donates \$150,000 to the Sydney Children's Hospitals Foundation.

On 2 May 2024, Shaw and Partners proudly contributed \$150,000 to the Sydney Children's Hospitals Foundation (SCHF) as the Presenting Partner of Gold Dinner 2024. This extraordinary evening raised a record-breaking \$33.4 million, surpassing all expectations and reinforcing its impact on the future of paediatric healthcare.

Now in our third consecutive year as a Gold Dinner supporter, Shaw and Partners is incredibly proud to continue its long-standing partnership with SCHF. At the core of this collaboration is a shared dedication to making a significant and lasting impact on the lives of children and their families facing health challenges.

### A commitment to exceptional care for future generations

Shaw and Partners is honoured to stand alongside Sydney Children's Hospitals Foundation, building upon the achievements of previous years. In 2023, our support helped raise \$19.2 million, directly contributing to the development of the Kookaburra Centre, set to open in 2025. This centre will provide world-class care and essential services to children in need, offering a space designed to enhance treatment and recovery for young patients.

The impact of Gold Dinner 2024 extends across various critical areas, with funds supporting a new emergency department and children's playground at Randwick, a new children's cancer centre at Westmead and vital services across intensive care, neurology, the burns unit, and dedicated family spaces.



Shaw and Partners Co-CEO, Earl Evans, expressed his firm belief in the cause, stating:

**“Children are our future, and there will always be a need for funding cutting-edge research, technology, and resources. We are committed to having embarked on this journey with the Sydney Children's Hospitals Foundation”.**

This stance illustrates Shaw and Partners' strong commitment to giving back to the communities where we work and live, with a focused effort on uplifting children and their families through health-related adversities.





Gold Dinner Co-Chairs Linda Penn and Joshua Penn proudly announce a world record-breaking donation to the Sydney Children's Hospitals Foundation.



Shaw and Partners Co-CEO Earl Evans takes the stage at Gold Dinner 2024, reaffirming support for Sydney Children's Hospitals Foundation.

**Gold Dinner: A legacy of giving**

Since its inception in 1997, Gold Dinner has raised nearly \$60 million for SCHF, an achievement made possible through the extraordinary dedication of the Gold Dinner Committee, led by Co-Chairs Linda Penn and Joshua Penn. Their commitment to philanthropy continues to shape the future of paediatric healthcare, ensuring that children across Australia receive the best medical care and support available.

Shaw and Partners understands that our responsibility extends beyond financial markets. We are dedicated to giving back to the communities in which we work and live, with a focused effort on uplifting children and their families through health-related adversities.

As we look ahead, Shaw and Partners remains committed to supporting the Sydney Children's Hospitals Foundation, ensuring that future generations continue to receive world-class care, research, and resources.

**Shaw and Partners is proud to be part of this journey and looks forward to continuing our partnership with SCHF.**

**\$1,600,000**

**CONTRIBUTED TOWARDS GOLD DINNER SINCE 2022**



Shaw and Partners Management Team and Foundation Committee Members proudly represented the firm at the 2024 Gold Dinner.



# Celebrating over \$10m donated to charity

## Shaw and Partners surpassed \$10 million in charitable giving during Foundation Week.

On 22 July 2024, Shaw and Partners proudly announced that the Shaw and Partners Foundation had surpassed a significant milestone, donating over \$10 million to charity since its inception in 2015.

The Shaw and Partners Foundation had originally pledged to raise and donate \$10 million by its 10-year anniversary in 2025. However, the goal was achieved in less than nine years, demonstrating the remarkable dedication and generosity of the firm. By this date, the Foundation had supported over 500 philanthropic projects and donated more than \$12 million to 300 Australian charities.

### Celebrating the milestone with Foundation Week

To mark this achievement, Shaw and Partners launched the Shaw and Partners Foundation Week initiative, held from 22 to 26 July 2024. During this time, the firm donated \$520,000 to over 40 charities across Australia. Funds were allocated across Shaw and Partners' six major offices—Sydney, Melbourne, Brisbane, Canberra, Adelaide, and Perth—where local staff and advisers nominated the beneficiaries.

Foundation Week also served as a tribute to every member of Shaw and Partners who contributed to the Foundation through monthly donations, volunteering, and fundraising efforts. The firm has continually matched contributions dollar for dollar, promoted activity-based fundraising, and provided pro bono consulting services to charities.

CHARITY NAME	OFFICE	NOMINATED BY
One Meal It Makes A Difference	NSW	Steven Arnison
Angel Flight Australia	NSW	Angela Holstein
Autism Swim	NSW	Paul Johnston
Kids Giving Back	NSW	Craig Maltz
Confit Pathways	NSW	Amanda Graham
Forster Neighbourhood Centre	NSW	Michael Holmes
Ovarian Cancer Research Foundation	NSW	Jelena Koncar
Breast Cancer Trials	NSW	Michael Holmes
Fight MND	NSW	Ernie Santone
Bear Cottage	NSW	Michael Crone
St George Clinical School Spine Service Fund	NSW	Gauthier Merlin
Rare Cancers Australia	ACT	Lee Moore
The Farm In Galong	ACT	Tom Kenyon
Canberra Hospital Foundation	ACT	Penny Ponder
Karinya House	ACT	Nicole Callan, David Maloney
Zero2hero	WA	Domenic Macri
Starlight Children's Hospital Foundation	WA	Robbie Gibbs
The Abbie Basson Sarcoma Foundation	WA	Garry Giblett
Charlies Foundation For Research	WA	Travis Hansen
Happiness Co Foundation	WA	Adam Russo
Women And Infants Research Foundation	WA	Rachael Green
Cystic Fibrosis	WA	Tim Bennett & Owen Clare
Ozharvest	QLD	Steve Elliot
3rd Space	QLD	James O'Kane
Foodbank	QLD	Philip Toop
Push For Better	QLD	Helen Acworth
The Peter MacCallum Cancer Foundation	VIC	Chris Wollermann
The Project Rokit Foundation	VIC	Freya Gunn
Olivia Newton-John Cancer Wellness & Research	VIC	Jason Wong
Flicker Of Hope	VIC	Joe Di Fede & Geoff Lloyd
Fight Parkinsons	VIC	Carl Daffy
The Male Hug	VIC	Nick Taylor
Fitted For Work	VIC	Lisa Taranto
Koala Kids Foundation	VIC	Peter Foster
Backpack 4 Vic Kids	VIC	Andrew Hines
Mito Foundation	SA	Mark Landau
Williams Syndrome Association Of SA	SA	Adam Boon
Puddle Jumpers SA	SA	RVA Team
Youth Opportunities SA	SA	RVA Team
The Hospital Research Foundation   Breast Cancer	SA	Jed Richards
Kick Start For Kids	SA	RVA Team



**Shaw and Partners**  
**FOUNDATION**  
Have fun. Live life. Give back.

Celebrating  
over  
**\$10 million**  
donated to charity  
since 2015

Thank you for your generous  
contributions and ongoing support  
JULY 2024

**Shaw and Partners**  
Financial Services

**A commitment to making a lasting impact**

Since its establishment in 2015, the Shaw and Partners Foundation has remained committed to supporting mental health, education, and social inclusion, ensuring that funds reach those in need. The Foundation's goal is to instil and perpetuate real change in the fabric of Australian society.

On the final day of Foundation Week, Shaw and Partners CEO Earl Evans expressed his gratitude, stating:

**“Thank you to everyone at Shaw and Partners for your generous contributions and support, without which it would not be possible to do what we have just done, not only in the last five days but the last nine years. It is quite extraordinary, and all Shaw and Partners Management, Staff, and Advisers should be very proud. Your contributions have made a real difference, and together, we will continue to empower and uplift communities across Australia.”**

In total, 41 charities were selected to receive donations during Foundation Week, with over \$500,000 contributed to causes that positively impact communities nationwide.

Shaw and Partners remains dedicated to giving back and continuing its philanthropic journey, ensuring its impact extends far beyond the financial sector.

**FORTY-ONE**

**CHARITIES RECEIVED VITAL FUNDING DURING FOUNDATION WEEK**

**\$520,000**

**DONATED TO CHARITY DURING FOUNDATION WEEK**



# Shaw and Partners kicks off celebrations across offices nationwide













# Golden Ticket Winners

## Making a big difference in our communities.

As part of Shaw and Partners Foundation Week, we celebrated giving back in a unique and exciting way by allowing staff to direct funds to local charities through our Golden Ticket Draw.

Each office was allocated a share of the \$500,000 donation pool, distributed based on staff participation and contributions to the Foundation. This ensured a fair and meaningful impact across all our locations.

The Golden Ticket Draw gave lucky Foundation contributors in each office the chance to personally select a charity within their local community to receive either \$10,000 or \$20,000 in funding. These donations were targeted toward charities focused on mental health, education, and social inclusion, helping smaller organisations that may not have access to large-scale funding.

Additionally, offices participated in a nomination and voting process, where team members could put forward their chosen charities, with the most-voted charities receiving significant donations.

A huge congratulations to our Golden Ticket winners—your choices have made a real impact in communities across Australia. Thank you to everyone who participated in nominating, voting, and supporting this initiative, reinforcing the Shaw and Partners Foundation's mission to create lasting change where it is needed most.





**And the Golden ticket winners are...**



Karinya House was nominated by Nicole Callan and David Maloney



ONJ Cancer Wellness & Research was nominated by Jason Wong



Bear Cottage was nominated by Michael Crone



Cystic Fibrosis WA was nominated by Owen Clare



Zero2Hero was nominated by Domenic Macri





Peter Mac was nominated by Chris Wollermann



Koala Kids was nominated by Peter Foster



One Meal It Makes a Difference was nominated by Steve Arnison



Breast Cancer Trials was nominated by Michael Holmes



Charles Foundation for Research was nominated by Travis Hansen





Project Rokit was nominated by Freya Gunn



The Farm in Galong was nominated by Tom Kenyon



Backpacks 4 Vic Kids was nominated by Andrew Hines



The Abbie Basson Sarcoma was nominated by Garry Giblett



Fight MND was nominated by Ernie Santone





Starlight Children's Hospital Foundation was nominated by Robbie Gibbs



Ovarian Cancer Research was nominated by Jelena Koncar



Fitted for Work was nominated by Lisa Taranto



St George Clinical Spine was nominated by Gauthier Merlin



Flicker of Hope was nominated by Joe Di Fede & Geoff Lloyd



# A message of gratitude and celebration

During Shaw and Partners Foundation Week, we marked a monumental milestone—surpassing \$10 million in charitable donations since the Foundation’s inception in 2015. This achievement was only possible thanks to the dedication, generosity, and community spirit of our staff, advisers, and supporters nationwide.

As we celebrated this incredible accomplishment, celebrities and members of the Shaw and Partners network sent messages of encouragement and congratulations, recognising the impact of our collective efforts in supporting mental health, education, and social inclusion across Australia.

The overwhelming support from leaders, athletes, and public figures reflects the significance of this milestone and reinforces the power of philanthropy in creating lasting change. Their words of appreciation serve as a reminder that every dollar raised and every initiative supported has helped uplift communities and improve lives.

We extend our heartfelt gratitude to everyone who has contributed—whether through donations, fundraising, volunteering, or advocacy.

**Together, we have made a real difference, and this is just the beginning.**

**“Thank you for being part of this journey and for helping us reach this remarkable milestone.”**



CLICK IMAGE TO PLAY VIDEO or SCAN QR

**Watch the celebration video from the Shaw and Partners Foundation**





**CHARLIE TEO**



**ALLISON LANGDON**



**GUS WORLAND**



**STEVE SMITH**



**ALLANA FERGUSON**



**MATT BEVILACQUA**



**RICKY STUART**



**KATE FERGUSON**



**MIKE WILSON**



**LANA ROGERS**



**HUGH JACKMAN**



**STEVE JACOBS**



**GIORGIO PRADELLI**



**KATH KOSCHEL**



**COOPER CRONK**



**JACK PERKINS**



**KARL STEFANOVIC**



**JUDE BOLTON**



**BONNIE HANCOCK**



**ALL DAY**



**TOM TRBOJEVIC**



**GEORGIA FITZSIMMONS**



**WILL BROWN**





## Shaw and Partners bakes all night for Cancer Council's Biggest Morning Tea

**On 11 June 2024, Shaw and Partners offices nationwide came together to host the 2024 Australia's Biggest Morning Tea, raising funds for Cancer Council Australia.**

This year's event was bigger than ever, uniting teams across the country in support of vital cancer research, support services, prevention programs, and advocacy.

The success of this initiative is owed to Heather Wilson and Judith Royal from the Sydney office, who have been the driving force behind Shaw and Partners' Biggest Morning Tea for over 25 years. Their dedication and passion ensure that every year, colleagues across all offices prepare an incredible feast to support this important cause.

Thanks to generous donations from staff and the Shaw and Partners Foundation, which matched every contribution, the firm raised a total of \$24,560 across multiple state Cancer Council branches:

Cancer Council ACT	\$725
Cancer Council NSW	\$7,831
Cancer Council VIC	\$1,276
Cancer Council WA	\$2,448

A heartfelt thank you to Heather, Judith, Lisa Nguyen, and our incredible administrative team for their tireless efforts in making this event such a success.

Shaw and Partners is proud to support Cancer Council Australia and remains committed to fundraising efforts that make a real difference in the lives of those affected by cancer.

**\$24,560**

**DONATED TO CANCER COUNCIL**

- Shaw and Partners Melbourne office hosts a delicious spread for Australia's Biggest Morning Tea, supporting Cancer Council Australia.
- Heather Wilson and Judith Royal, the driving forces behind Shaw and Partners' Biggest Morning Tea, celebrating another successful fundraising event.
- Shaw and Partners Canberra team is ready to tackle the Biggest Morning Tea, raising funds for Cancer Council Australia.
- A delicious spread in Perth in support of Australia's Biggest Morning Tea and Cancer Council Australia.









# “Not an Overnight Success” Podcast Season 4

## Shaw and Partners donates \$100,000 during “Not an Overnight Success” podcast Season 4.

### Charities supported by our guests

<b>Susie O'Neill</b> – Fred Hollows Foundation
<b>Lord Ian Botham</b> – Beefy's Charity Foundation
<b>Lorna Jane Clarkson</b> – Women's Community Shelters
<b>Pat Rafter</b> – Adara
<b>Tara Rae Moss</b> – Pain Australia
<b>Charlie Teo</b> – The Charlie Teo Foundation, Villa Kitty, Zambi Wildlife Foundation, and Voiceless
<b>Allison Langdon</b> – The Mirabel Foundation
<b>Phil 'Gus' Gould</b> – The Mark Hughes Foundation
<b>Ellie Cole</b> – Camp Quality and Challenge
<b>Sir John Kirwan</b> – Gotcha4Life

Hosted by Gotcha4Life Founder Gus Worland and proudly supported by Shaw and Partners, the podcast series "Not an Overnight Success" continues to spotlight inspiring individuals from a wide range of backgrounds, sharing their journeys towards success.

As part of its commitment to giving back, Shaw and Partners donated \$10,000 on behalf of each guest to charities close to their hearts, resulting

in a total contribution of \$100,000 this season. This initiative reflects the firm's appreciation for these remarkable guests who not only share their stories but also use their influence to create positive change.

With \$300,000 donated in 2020-22, Shaw and Partners has now contributed an incredible \$400,000 through "Not an Overnight Success"—a testament to its commitment to philanthropy and community impact.

"We are incredibly proud to have donated \$400,000 through this podcast series, supporting charities that truly make a difference. Shaw and Partners remains dedicated to using its platform to promote positivity and give back to the community," said Shaw and Partners CEO Earl Evans.

Shaw and Partners is proud to support "Not an Overnight Success", and we look forward to continuing our mission of giving back in the years ahead.

# \$400,000

**DONATED DURING "NOT AN OVERNIGHT SUCCESS" PODCAST SEASONS 1-4**

**“For every guest featured in the program, Shaw and Partners proudly contributed \$10,000 to a charity of their choice.”**





**NOT AN OVERNIGHT SUCCESS**  
A GUS WORLAND PODCAST SERIES  
PROUDLY BROUGHT TO YOU BY  
**Shaw and Partners**  
Financial Services

**SEASON 4**



Shaw and Partners  
Financial Services

**NOT AN OVERNIGHT SUCCESS**

**SUSIE O'NEILL**

EP1 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**SIR IAN BOTHAM**

EP2 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**LORNA JANE CLARKSON**

EP3 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**PAT RAFTER**

EP4 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**TARA RAE MOSS**

EP5 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**CHARLIE TEO**

EP6 SEASON 4




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**NOT AN OVERNIGHT SUCCESS**

**ALLISON LANGDON**

EP7 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**PHIL 'GUS' GOULD**

EP8 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**ELLIE COLE**

EP9 SEASON 4



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**NOT AN OVERNIGHT SUCCESS**

**SIR JOHN KIRWAN**

EP10 SEASON 4

**Catch up on all season 4 episodes**








# Shaw and Partners Perth office walks 1,250km for childhood cancer, raising over \$36,000

**A massive thank you to the incredible Shaw and Partners Perth office for their outstanding efforts in the Heartbreak to Hope Walk throughout June 2024.**

The "Shaw Things" team walked an impressive 1,250km, raising over \$36,000—and counting—for the Redkite Foundation to support families facing childhood cancer.

Shaw and Partners was proud to be the major partner of Redkite's Heartbreak to Hope Walk, matching all donations dollar for dollar up to \$30,000. Through this collective effort, over \$275,000 was raised, providing emotional, financial, and practical support to families navigating the challenges of childhood cancer.

Every month, 88 children in Australia are diagnosed with cancer, forever changing the lives of their families. The support from Shaw and Partners, Redkite, and generous donors ensures these families don't have to face the battle alone.

Thank you to everyone who walked, donated, and supported this initiative. Your dedication and generosity will make a lasting difference for families in need.

**A special shout-out to Mark Palmer, Senior Private Wealth Adviser, who personally raised over \$12,300, demonstrating incredible commitment to this cause.**

**\$36,918**

**RAISED FOR THE REDKITE FOUNDATION**

**\$30,000**

**IN MATCHED DONATIONS CONTRIBUTED DURING THE HEARTBREAK TO HOPE WALK**





17



OCT 2024

18

## Shaw and Partners takes the plunge for Variety WA, raising over \$18,900

**On Sunday, 27 October 2024, Jenny Rachmat from the Shaw and Partners Perth office took on the Central Park Plunge, abseiling 33 floors down Perth's tallest building to raise funds for Variety – the Children's Charity WA.**

With sweaty palms and a racing heart, Jenny embraced the challenge with determination and a big smile, pushing herself well beyond her comfort zone. Her incredible effort was not only a personal achievement but also a remarkable fundraising success. Thanks to the overwhelming support from clients, colleagues, friends, and family, she became the highest individual fundraiser, raising an extraordinary \$18,916 for children in need.

The Shaw and Partners Foundation proudly supported Jenny's campaign with a generous donation, reinforcing the firm's strong philanthropic culture and commitment to making a difference. A special mention goes to Shaw

and Partners CEO Earl Evans for his outstanding generosity and continued belief in the power of giving back.

On behalf of Variety WA, Jenny expressed her heartfelt gratitude to everyone who contributed, helping to bring joy and support to children and families across Western Australia.

**Congratulations, Jenny, on an incredible achievement—your courage and dedication inspire us all!**

**\$18,916**

**DONATED TO VARIETY, THE CHILDREN'S CHARITY WA**

- 16. The Perth team united for the Heartbreak to Hope Walk, raising over \$36,000 for Redkite Foundation to support families facing childhood cancer.
- 17. Jenny Rachmat is all smiles before taking the Central Park Plunge for Variety – the Children's Charity WA!
- 18. "Look, no hands!" Jenny Rachmat fearlessly takes on the Central Park Plunge for a great cause!



ShawandPartners

# Foundation Committee Members in 2024

**The Foundation Committee encourages all Shaw and Partners employees to get involved in causes they are passionate about.**



**“At Shaw and Partners, we are passionate about giving back to the communities in which we work and live”.**

ShawandPartners  
**FOUNDATION**





# Foundation Newsletters

## 2016-2023 Editions

### Explore the legacy of the Shaw and Partners Foundation.

Since 2015, the Shaw and Partners Foundation has been making a meaningful impact through philanthropy, fundraising, and community initiatives. Each edition of our Foundation Newsletter captures the milestones, stories, and achievements that define our commitment to giving back.

### Missed an edition?

Click the images below or scan the QR code to revisit past newsletters (2016–2023) and see how we've grown together.

**2016**

ShawandPartners FOUNDATION Inaugural Newsletter

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

**Message from the Chairman**

**Our commitment to the community**

CLICK IMAGE / SCAN QR

**2017**

ShawandPartners FOUNDATION Newsletter - 2nd Edition

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

**A MESSAGE FROM THE CHAIRMAN**

**Our commitment to the community**

CLICK IMAGE / SCAN QR

**2018**

ShawandPartners FOUNDATION Newsletter - 3rd Edition

**Our commitment to the community**

CLICK IMAGE / SCAN QR

**2019/20**

ShawandPartners FOUNDATION Foundation Newsletter 2019/20 Edition

CLICK IMAGE / SCAN QR

**2021**

ShawandPartners FOUNDATION Foundation Newsletter 2021 Edition

CLICK IMAGE / SCAN QR

**2022**

ShawandPartners FOUNDATION Foundation Newsletter 2022

CLICK IMAGE / SCAN QR

**2023**

ShawandPartners FOUNDATION Foundation Newsletter 2023

CLICK IMAGE / SCAN QR



# We've asked the Committee Members

## Four questions



### Earl Evans

CEO at Shaw and Partners &  
Foundation Committee Member

Shaw and Partners  
FOUNDATION

#### Why did you decide to join the Foundation Committee?

Over a decade ago, I, along with other leaders within Shaw and Partners, founded the Foundation Committee with a simple but powerful vision: to create a meaningful way for our business to give back to the communities we live and operate in. We believed then—as we do now—that success in business is not just about financial results, but about the impact we can have on society.

The Foundation was built on the idea that philanthropy should be an integral part of our company culture, not just a side initiative. Over the past ten years, we've seen firsthand how even relatively small contributions, when directed thoughtfully, can make a significant difference in people's lives. Being part of this journey from the beginning has been incredibly rewarding, and my continued involvement in the Foundation Committee is a reflection of my deep commitment to ensuring that we keep making a real, tangible impact.

#### What's your favourite charity, and why?

I don't have one single favourite charity, and in many ways, I think that's a good thing. Some of the most meaningful charities are the ones I haven't even heard of yet—the small, grassroots organisations that operate at a local level, driven by passionate individuals who see a need and take action. What makes these charities truly special is the dedication of our own staff, who rally together, raise \$5,000, \$10,000, or more, and ensure every dollar goes directly back into the community.

While large, well-known charities play an important role, I am particularly drawn to those that work quietly but effectively, often without recognition. These smaller organisations tend to have minimal overhead, ensuring that every contribution has a direct and tangible impact. Whether it's a local mental health initiative, a program supporting disadvantaged youth, or an organisation helping families rebuild after hardship, these are the causes that resonate most with me. Their impact is often immediate, deeply personal, and truly transformative.

#### Can you share an experience where volunteering made a significant impact on your life?

There have been many moments throughout my career where I've witnessed the true power of giving—both in financial contributions and through the time and effort dedicated to

helping others. What stands out most is the profound impact of direct community engagement. It's one thing to support a cause financially, but it's another to be actively involved, to hear people's stories firsthand, and to see how even the smallest gestures can make a real difference in someone's life.

I have had the privilege of working alongside individuals whose unwavering dedication to service is truly inspiring. Their commitment, often without expectation of recognition or reward, is a powerful reminder that philanthropy is not just about large-scale initiatives—it's about showing up, offering support where it's needed, and making a difference in any way you can. These experiences have reinforced my belief that true philanthropy is built on connection, compassion, and a genuine willingness to be part of the solution.

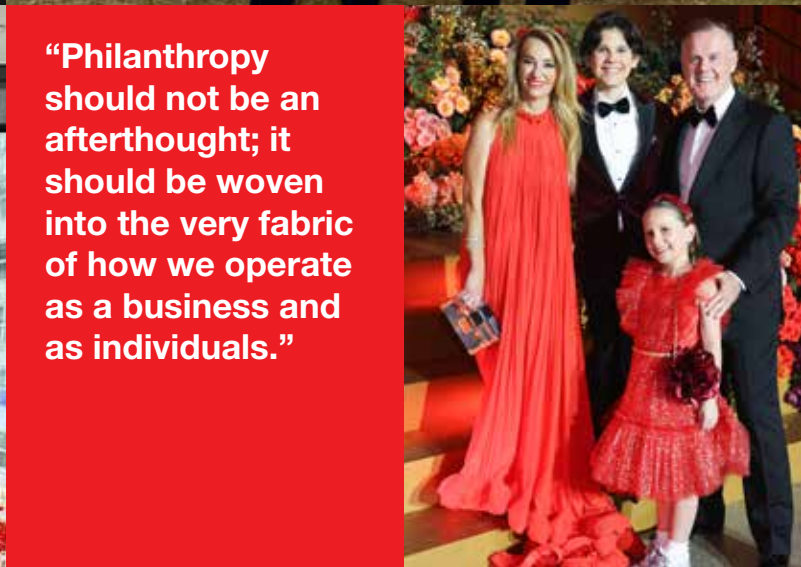
#### What are your goals or aspirations for our foundation during your tenure?

Since its inception, the Shaw and Partners Foundation has grown into something truly special, and I want to ensure that its legacy continues to strengthen in the years to come. My primary goal is to see our foundation deepen its impact by continuing to support causes that create real, measurable change. This means not only directing funds where they are most needed but also fostering a culture of hands-on engagement—encouraging our people to get involved at a grassroots level, whether through volunteering, fundraising, or mentorship.

I also want to further solidify our reputation as a firm that values giving back. When we founded the Foundation Committee ten years ago, we wanted philanthropy to be a core pillar of Shaw and Partners. I want to ensure that this commitment remains a defining feature of our company culture. That means making it easier for our staff to participate in charitable initiatives, supporting the causes they are passionate about, and ensuring that our efforts make a lasting difference.

Ultimately, I want our foundation to be known not just for the money we donate, but for the lives we change. If, by the end of my tenure, we've inspired more people to take action—whether inside or outside the firm—then I'll consider that a success. Philanthropy should not be an afterthought; it should be woven into the very fabric of how we operate as a business and as individuals. That is what I hope to achieve.







# We've asked the Committee Members

## Four questions



### Brittany Hughes

General Manager, Wealth Management & Foundation Committee Member

ShawandPartners  
FOUNDATION

#### Why did you decide to join the Foundation Committee?

I grew up in a very caring and empathetic family, and from a young age, I became acutely aware of the challenges others face—particularly because my younger brother was very sick. Before officially joining the Foundation Committee, I had been supporting its work from the sidelines for some time, so when the opportunity arose to join the committee, I jumped at the chance.

Being part of the committee is something I truly love. I find it particularly special when charities we support visit our office to share how our contributions help their respective causes. Like many workplaces—especially in the financial sector—days here can be incredibly busy and fast-paced. So, when the entire office pauses, even for just 10 minutes, to hear how our donations have helped sick children from rural areas access cancer treatment or provided safe housing for women and children escaping domestic violence, it certainly puts life into perspective. It's a powerful reminder of why this work matters.

#### What's your favourite charity, and why?

How do you choose! At the moment, I'd have to say What Ability. What Steve Dresler and his team have been able to achieve in such a short time is nothing short of amazing. I truly believe they have transformed the disability space in Australia, making inclusion, joy and adventure a priority and accessible to so many people.

Each year, as part of one of our largest sporting sponsorship events, we host a beach morning for people living with a disability, alongside our sponsored surf iron athletes and the What Ability support staff. Seeing the pure joy on the participants' faces is all the proof you need that this organisation is making a profound impact on families' lives. What Ability is about putting happiness first—and they do that in spades.

#### Can you share an experience where volunteering made a significant impact on your life?

As I mentioned earlier, growing up, my younger brother was very sick, and we spent a lot of time in Randwick and Westmead Children's Hospitals. At times, my mother and brother lived in hospital for months on end. In a world where days are consumed by tests, treatments, and the constant

anxiety of waiting for good or bad news, even a brief visit from a familiar or well-known face can make a sick child's entire week.

I recall my brother's favourite football players visiting, as well as famous authors and musicians who performed concerts in the hospital. These individuals, despite their busy schedules, went out of their way to volunteer their time to brighten a sick child's day. The power of these visits is so immense, and money can't buy that, simply effort and empathy.

#### What are your goals or aspirations for our foundation during your tenure?

Shaw and Partners has spent the last decade building a strong culture of giving back to the communities we live and work in. Now, ten years on, as a member of the Foundation Committee, I see it as our responsibility not just to maintain that momentum but to build on it. What sets our foundation apart is that it isn't just an initiative—it's deeply embedded in who we are as a business. From the CEO and board to the newest team member, philanthropy is a shared commitment that defines who we are.

Personally, I feel strongly about being a voice for the Foundation and the charities we support. While some people naturally prefer to work behind the scenes, I try to use my position to advocate for these causes, raise awareness, and share the stories of the individuals and communities we're helping. Whether that's through internal events, conversations with colleagues, or broader outreach, I try to ensure the incredible work of these charities is recognised and amplified.





“Sometimes, even the smallest gesture can turn someone’s day around. Our Foundation is about driving real change in the fabric of Australian society, but it’s also about those little moments that make a big difference.”





# We've asked the Committee Members

## Four questions



### Fraser MacLeod

South Australia State Manager &  
Foundation Committee Member

Shaw and Partners  
FOUNDATION

#### Why did you decide to join the Foundation Committee?

Being part of the Shaw and Partners Foundation Committee allows me to contribute in a meaningful and hands-on way, beyond just financial support. It's about actively engaging with the community, working alongside dedicated organisations, and seeing the direct impact of our efforts. Philanthropy has always been a core value of mine, and I believe that by supporting important causes, we can create lasting, positive change. The Foundation provides an opportunity to amplify our collective efforts, ensuring that the funds we raise genuinely make a difference in people's lives. I'm proud to be part of an organisation that prioritises giving back and supporting those in need.

#### What's your favourite charity, and why?

JDRF (Juvenile Diabetes Research Foundation) holds a deep personal significance for me, as I have lived with Type 1 Diabetes since childhood. Their work is critical—not just in funding cutting-edge research to improve treatments and one day find a cure, but also in providing support and advocacy for individuals and families navigating this condition. Managing Type 1 Diabetes is a lifelong challenge, and the resources JDRF provides help people live healthier, more independent lives. I've seen firsthand the difference their initiatives make, from advancing medical technology to offering education and emotional support to young people and their families. Supporting JDRF is a way for me to contribute to a future where Type 1 Diabetes no longer limits anyone's potential.

#### Can you share an experience where volunteering made a significant impact on your life?

One of the most eye-opening and rewarding experiences was in 2023, when our Adelaide office volunteered at the Hutt Street Centre, a vital organisation providing meals, support, and services to people experiencing homelessness. Spending the day preparing and serving meals, I was struck by the resilience and gratitude of the individuals we met. Beyond just providing food, it was clear that the Hutt Street Centre offers something even more essential—dignity, connection, and hope.

That day reinforced how important it is to support charities addressing social exclusion and poverty. It also reminded me how quickly circumstances can change for anyone, and how a

helping hand at the right time can make all the difference. The experience left a lasting impact on me and strengthened my commitment to volunteering and supporting organisations that provide not just assistance, but long-term solutions for those in need. We now volunteer each year at the Hutt Street Centre.

#### What are your goals or aspirations for our Foundation during your tenure?

Last year, the Shaw and Partners Foundation reached a major milestone—\$10 million raised and donated since its inception in 2015. It was an incredible achievement, but it's just the beginning. My goal is to build on this momentum and ensure that we continue to expand our reach, deepen our impact, and support even more charities making a tangible difference in people's lives.

I want to encourage more involvement—not just through donations, but through active participation, fostering a culture of giving where everyone feels empowered to contribute in their own way. By strengthening our partnerships with charities, supporting initiatives that address mental health, social inequality, medical research, and community development, and inspiring others to give back, we can make an even greater difference.

I was especially proud to represent the Shaw and Partners Foundation in running the New York Marathon, November 2024 and raising \$11,000 for the local Adelaide based Breakthrough Mental Health Charity.

Being part of this team is an honour, and I'm committed to ensuring that the Foundation's legacy of generosity continues to grow. We live by a simple yet powerful motto: Have fun, Live life, Give back. I look forward to making that philosophy a reality for as many people as possible





**“Giving back isn’t just about donations – it’s about showing up, making connections, and creating lasting change where it’s needed most.”**





# Proudly supporting Gotcha4Life

## Shaw and Partners donates \$100,000 during the 2024 Gotcha4Life Cup.

On Saturday 27 July 2024, the annual Gotcha4Life Cup saw the Sydney Roosters and Manly Warringah Sea Eagles put their rivalry aside at Allianz Stadium to promote mental fitness and raise crucial funds for the Gotcha4Life Foundation. With Shaw and Partners proudly sponsoring the Sea Eagles and Unibet backing the Roosters, the event emphasised the importance of emotional resilience and meaningful conversations.

### A cause that matters

The Gotcha4Life Cup is more than a game—it is a movement towards better mental fitness. With nine Australian lives lost to suicide every day and one in two Australians requiring mental health support in the last three months, the need for awareness has never been greater. The event encouraged people to reach out, connect, and build emotional strength.

Gotcha4Life Founder Gus Worland reinforced this message, stating: "Mental fitness is something we all need to work on. Thanks to our sponsors Shaw and Partners and Unibet, we can continue to provide programs and resources to help Australians build resilience."

### The game and fundraising success

With an electric atmosphere at Allianz Stadium, fans enjoyed a competitive match, a half-time celebrity game, and the sale of Gotcha4Life Mateship bands. Players wore Gotcha4Life logos on their jerseys and socks, reinforcing their commitment to this vital cause.

Shaw and Partners and Unibet each contributed \$100,000, bringing the total donation to \$200,000. These funds will support the expansion of Gotcha4Life's mental fitness programs across Australia, including the free online Mental Fitness Gym.

### Messages from the players

Manly Warringah Sea Eagles captain Daly Cherry-Evans emphasised the importance of checking in on loved ones, stating,

"It's about looking out for each other—friends, family, teammates. A simple conversation can make a world of difference."

Sydney Roosters captain James Tedesco echoed this, highlighting the role of mental fitness in a team environment:

"We look after each other on the field, but it's just as important to do so off the field by having honest conversations."

### Continuing the mission

Following the match, team jerseys were auctioned off to raise additional funds for Gotcha4Life. The success of this year's event underscores the growing commitment to mental fitness, with Shaw and Partners playing a crucial role in making a meaningful impact.

For more information or to support Gotcha4Life's mental fitness initiatives, visit Gotcha4Life's website.



# \$100,000

**DONATED TO CHARITY DURING  
THE GOTCHA4LIFE CUP**



JUL 2024



# GOTCHA 4LIFE CUP

Saturday 27 July,  
7:35pm  
Allanz Stadium,  
Moore Park

LEARN MORE



Shaw and Partners  
Financial Services







The gym for your emotional muscles is now open.



**GOTCHA4LIFE MENTAL FITNESS GYM**

Join for free today

[thementalfitnessgym.org](http://thementalfitnessgym.org)



19

## Shaw and Partners helps raise \$1,250,000 for Gotcha4Life during Magic Round

On 17 May 2024, Shaw and Partners proudly partnered with the National Rugby League (NRL) and Channel Nine to raise an incredible \$1,250,000 for the Gotcha4Life Foundation during the Magic 4 Mental Fitness Fundraising Breakfast in Brisbane.

The event saw all 17 NRL teams donate \$30,000 each, bringing their collective contribution to \$510,000. In a show of strong commitment to mental fitness, Shaw and Partners matched these donations dollar for dollar, adding another \$510,000 to the total raised.

Gotcha4Life is a not-for-profit foundation dedicated to suicide prevention by providing mental fitness programs to Australians in need. The foundation's mission is to educate, empower, and encourage meaningful conversations that strengthen emotional resilience.

Shaw and Partners is honoured to collaborate with Gotcha4Life once again, supporting its life-changing initiatives that help Australians take positive steps toward better mental fitness.

This remarkable fundraising success underscores the power of community, sport, and philanthropy in tackling one of Australia's most pressing issues—mental health and suicide prevention.

Shaw and Partners remains committed to supporting Gotcha4Life and initiatives that foster mental fitness, resilience, and well-being across the nation.

19. Shaw and Partners Co-CEO Earl Evans and Gotcha4Life Founder Gus Worland celebrate an incredible \$1.25 million raised for Gotcha4Life at the Magic Round Mental Fitness Fundraising Breakfast!

**\$510,000**

**DONATED TO GOTCHA4LIFE FOUNDATION**







## Shaw and Partners supports Gotcha4Life’s mental fitness initiatives at NSW Parliament House

On 24 October 2024, Brittany Hughes from Shaw and Partners was delighted to attend the Gotcha4Life Mental Health Month Mid-Afternoon Briefing at NSW Parliament House, an event focused on preventative mental health initiatives and the success of Gotcha4Life’s Mentally Fit Primary Schools Program pilot.

The discussion featured a distinguished panel, including Minister for Mental Health, The Hon. Rose Jackson MLC, Clinical Psychologist Dr. Jodie Lowinger, Gotcha4Life Founder Gus Worland, Gotcha4Life CEO Belinda Elworthy, and Nicholson Street Public School Principal Lucy Norrish, who shared the school’s experience with the program.

The briefing underscored the importance of proactive mental fitness strategies in primary schools, not only for children but also for parents, teachers, and carers. Real-life examples from the pilot program highlighted its tangible and life-changing

impact on shaping young Australians’ mindsets.

Gotcha4Life continues to work tirelessly to address Australia’s alarming mental health statistics, with the goal of securing government support for its primary school program—a significant step toward a mentally fitter future.

**Shaw and Partners is proud to support Gotcha4Life in building resilience and mental fitness in young Australians.**

During a minor conflict, a Year 4 student said to a peer: “Even though we’re not best friends, you’re part of my village, and it’s my job to make sure you’re okay.” This simple act of empathy shows the lasting impact of the Mentally Fit Primary Schools program.

Principal, Nicholson Street Public School





Shaw  
and  
Partners  
Financial Services

Shaw and Partners  
has assisted over  
300 charities  
since 2015.

**\$92,090**

**HAS BEEN DONATED TO THE BEYONDBLUE  
FOUNDATION BY SHAW AND PARTNERS  
SINCE 2015.**



Proudly supporting

**Beyond  
Blue**

### Partnership with the Cure Brain Cancer Foundation

The Cure Brain Cancer Foundation is an Australian non-profit organisation dedicated to improving brain cancer survival rates and enhancing the quality of life for those affected by the disease.

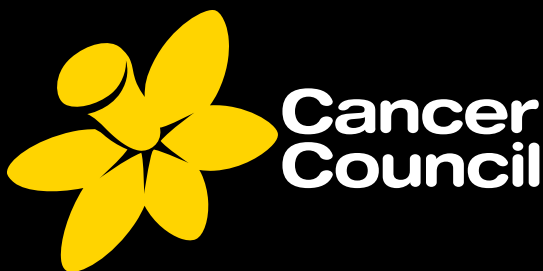
Established in 2001, it is the leading funder of brain cancer research in Australia. The Foundation's mission is to unite the community to rapidly increase survival rates and improve the lives of people impacted by brain cancer.

Cure Brain Cancer Foundation has invested over \$30 million into clinical trials and pre-clinical research across both paediatric and adult brain cancers. The Foundation supports innovative research initiatives, such as the Guardian Trust Early Career Fellowship, which provides comprehensive support to young researchers for pioneering breakthroughs in brain cancer treatment. Additionally, the Foundation has been involved in significant global collaborations, including the launch of the revolutionary GBM AGILE clinical trial in Australia.

ShawandPartners  
FOUNDATION

**\$370,000**

**HAS BEEN DONATED TO THE CANCER  
COUNCIL FOUNDATION BY SHAW AND  
PARTNERS SINCE 2015.**



**\$164,950**

**HAS BEEN DONATED TO THE CURE BRAIN  
CANCER FOUNDATION BY SHAW AND  
PARTNERS SINCE 2015.**



**Cure Brain Cancer  
FOUNDATION**

Many minds, one purpose

### Partnership with the Fight MND Foundation

The Fight MND Foundation, established in 2014, is a leading Australian charity dedicated to finding effective treatments and ultimately a cure for Motor Neurone Disease (MND). Also known as amyotrophic lateral sclerosis (ALS), MND is a progressive, debilitating disease that affects the nerve cells controlling the muscles that enable movement, speech, swallowing, and breathing.

Fight MND focuses on three main strategic priorities: funding cutting-edge research, advocating for better care standards, and providing targeted support for people living with MND. The foundation has invested over \$84 million into vital research projects, including clinical trials, drug development, and studies aimed at understanding the causes of MND.

In addition to research, Fight MND is also committed to improving the quality of life for those affected by the disease. This includes supporting the development of national care standards and providing resources and support through partnerships with MND State Associations and other organisations.

Research

ShawandPartners  
FOUNDATION

ShawandPartners  
FOUNDATION

### Partnership with the Beyond Blue Foundation

Beyond Blue is a prominent Australian mental health organisation established to support individuals experiencing anxiety, depression, and other mental health issues.

Founded in 2000, Beyond Blue offers a range of services including a 24/7 helpline, online chat, and email counselling. The organisation is dedicated to providing immediate support and resources for mental health, focusing on prevention, early intervention, and recovery.

Beyond Blue works collaboratively with governments, health services, educational institutions, workplaces, and the community to raise awareness and reduce the stigma surrounding mental health issues. Their programmes and initiatives aim to improve the mental well-being of all Australians, emphasising the importance of reaching out for help and maintaining mental health.



**\$250,405**

**HAS BEEN DONATED TO THE FIGHT MND FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**

**FIGHT  
MND.  
IT TAKES PEOPLE**

**ShawandPartners  
FOUNDATION**

**Partnership with the Cancer Council Foundation**

Cancer Council Australia is the nation's leading cancer charity dedicated to reducing the impact of cancer through a comprehensive approach encompassing research, prevention, and support.

The organisation collaborates with eight state and territory cancer councils to undertake and fund significant cancer research, implement prevention programmes, and provide crucial support and information to those affected by cancer.

Their mission is to lead efforts towards a cohesive and effective strategy in cancer control, aiming for a future free from cancer. They are involved in various activities, including advocating for cancer patients, advising the government on cancer-related policies, and acting as a major funding contributor to health research, education, and prevention initiatives.

**\$1,547,635**

**HAS BEEN DONATED TO THE GOTCHA4LIFE FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**

**GOTCHA  
4LIFE**

**ShawandPartners  
FOUNDATION**

**Partnership with the Gotcha4Life Foundation**

Gotcha4Life is a not-for-profit foundation dedicated to building a mentally fit future. We develop and deliver preventative mental fitness campaigns, workshops, programmes, and resources in schools, sports clubs, workplaces, and communities Australia-wide. Gotcha4Life was established by media personality Gus Worland in 2017.

Gotcha4Life's mission is to inspire and enable people to take action to build their mental fitness. Our vision is a suicide-free world where no one worries alone.

Our work is based on three mental health protective factors: building emotional agility and flexibility, enabling social connectedness, and promoting help-seeking behaviour. We like to call these building your emotional muscles, nurturing your village, and never worrying alone.

Building connection and a sense of belonging sit at the heart of our Foundation. Read stories from our community and team about the power of connection, community, and the impact of building your emotional muscles.

**\$433,806**

**HAS BEEN DONATED TO THE JUVENILE DIABETES RESEARCH FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**

**JDRF** **IMPROVING LIVES. CURING TYPE 1 DIABETES.**

**ShawandPartners  
FOUNDATION**

**Partnership with the Juvenile Diabetes Research Foundation**

The Juvenile Diabetes Research Foundation (JDRF) Australia is a leading non-profit organisation dedicated to funding type 1 diabetes (T1D) research. Established in 1972, it is part of the global JDRF network, which is the largest funder of T1D research worldwide. JDRF Australia's mission is to accelerate life-changing breakthroughs to cure, prevent, and treat T1D and its complications.

The organisation supports a wide range of research initiatives, from early stage investigations to clinical trials of new treatments and technologies. Over the past five decades, JDRF has invested over \$2.25 billion globally and \$266 million in Australian research specifically. Their key projects include the Type 1 Diabetes Clinical Research Network (T1DCRN), which brings together world-class researchers to drive innovative advancements in T1D care.

JDRF Australia also focuses on advocacy, working to shape government policy and secure funding for T1D research and treatments. Additionally, they provide extensive support and resources for the T1D community, helping individuals manage their condition from diagnosis through adulthood.

**\$130,000**

**HAS BEEN DONATED TO KIDS HELPLINE BY SHAW AND PARTNERS SINCE 2015.**

**kidshelpline**  
Anytime Any Reason

**ShawandPartners  
FOUNDATION**

**Partnership with Kids Helpline**

Kids Helpline is a free, confidential, and private counselling service available 24/7 across Australia for young people aged 5 to 25. It offers support through phone, web chat, and email counselling.

Established in 1991, Kids Helpline provides assistance on various issues such as mental health concerns, relationship problems, bullying, sexual abuse, homelessness, suicidal thoughts, and more. The service is primarily funded by the community, along with support from government bodies and corporate sponsors.

The counsellors are university-qualified professionals who undergo additional training to handle the specific needs of young people. The service is designed to empower young people by helping them develop options, understand consequences, and build productive relationships with family and friends. Kids Helpline ensures that children and young people feel safe, respected, and supported in their times of need.



**\$188,700**

**HAS BEEN DONATED TO THE MITO FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**



### Partnership with the Mito Foundation

The Mito Foundation supports people affected by mitochondrial disease (mito), a debilitating and potentially fatal condition that reduces the ability of the mitochondria to produce energy and sustain life.

The Mito Foundation is the only organisation dedicated to supporting and empowering people affected by mito in Australia. It provides resources and support services for people impacted by mito and their families, while increasing awareness and understanding of this devastating disease.

The foundation aims to transform outcomes for the mito community by driving meaningful change and funding essential research into the prevention, diagnosis, treatment, and cures of mitochondrial disorders. The Mito Foundation's purpose is to end suffering from mitochondrial disease. To reach that goal, we are working towards preventions, treatments, and cures for mito. We are also striving to make these easily accessible to people with mito.

ShawandPartners FOUNDATION

**\$406,448**

**HAS BEEN DONATED TO THE MULTIPLE SCLEROSIS (MS) FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**



### Partnership with the Multiple Sclerosis Foundation

MS Australia is the leading national non-profit organisation dedicated to supporting individuals affected by multiple sclerosis (MS) in Australia. Established in 1975, the organisation focuses on research, advocacy, and providing support services to the MS community, which includes those living with the disease, their families, friends, and caregivers.

MS Australia collaborates with several state MS bodies to deliver comprehensive support and services. These state bodies include MS Limited, MS Queensland, MS Society SA/NT, and MSWA, covering different regions of Australia. The organisation is also a key partner in various national and international collaborations aimed at advancing research and improving the quality of life for people with MS.

The organisation runs significant research initiatives, such as the Australian MS Longitudinal Study and the MS Brain Bank, and supports clinical trials and other research programmes focused on finding a cure and better treatments for MS. One of their well-known fundraising campaigns, "Kiss Goodbye to MS," operates globally to raise awareness and funds for MS research.

ShawandPartners FOUNDATION

**\$104,565**

**HAS BEEN DONATED TO THE R U OK? FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**



### Partnership with the R U OK? Foundation

R U OK? is an Australian suicide prevention charity founded in 2009 by Gavin Larkin. The organisation's mission is to inspire and empower people to connect with those around them and support anyone struggling with life. The foundation emphasizes the importance of starting conversations and checking in on friends, family, and colleagues by asking the simple question, "Are you OK?"

The organisation holds an annual R U OK? Day on the second Thursday of September, encouraging Australians to engage in meaningful conversations that can potentially change lives. R U OK? also provides various resources and support to build the confidence and skills needed to have these important conversations throughout the year.

R U OK? does not provide crisis support or counselling services but focuses on public health promotion to foster a more connected community. The foundation is funded through corporate sponsorships, community donations, and the sale of merchandise.

ShawandPartners FOUNDATION

**\$388,333**

**HAS BEEN DONATED TO THE RICKY STUART FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**



### Partnership with the Ricky Stuart Foundation

Ricky Stuart Foundation's vision is to create an inclusive and accepting Australia through national educational and awareness campaigns and programmes in our schools, workplaces, and community.

Legendary ex-NFL player and coach Ricky Stuart, along with his wife Kayle, created the Ricky Stuart Foundation in 2011. Through the experience of raising a daughter with autism, the Canberra Raiders coach and his family quickly recognised they were positioned to promote real change after witnessing a lack of autism awareness, support, and respite care available to local families.

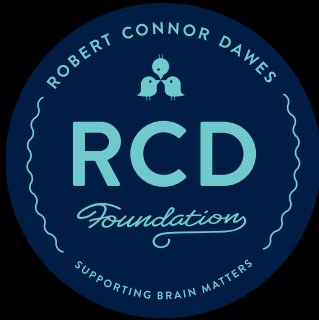
With incredible support from family and friends, as well as local and national contributions, the Ricky Stuart Foundation has delivered two state-of-the-art respite facilities in the ACT, and they are already planning their third project: a home for individuals with a disability. Additionally, they assist all those transitioning to homes for individuals with disabilities.

ShawandPartners FOUNDATION



**\$155,636**

**HAS BEEN DONATED TO THE ROBERT CONNOR DAWES FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**



### Partnership with the Robert Connor Dawes Foundation

The Robert Connor Dawes Foundation was created in June 2013 in the memory of Robert 'Connor' Dawes.

We are battling paediatric brain tumours and supporting brain matters in the areas of research, care and development – to fund the science to end brain cancer and support patients in the meantime.

Contributing funds to Australia and International brain cancer research to enable researchers to further understand and more completely treat brain tumours, including earlier detection, surgery and post surgery treatments (radiation & chemotherapy).

Our mission is to change the odds for young people facing brain cancer.

**Shaw and Partners**  
**FOUNDATION**

**\$1,899,246**

**HAS BEEN DONATED TO THE SYDNEY CHILDREN'S HOSPITALS FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**



### Partnership with the Sydney Children's Hospital Foundation

Sydney Children's Hospitals Foundation (SCHF) is one of Australia's largest and most trusted children's health charities, dedicated to providing world-class healthcare to sick children. Established in 1986, SCHF raises funds to support the Sydney Children's Hospitals Network, which includes two major children's hospitals, specialised care services, and cutting-edge paediatric research across New South Wales.

The Foundation's mission is to ensure that all children have access to the best possible healthcare, whenever and wherever they need it. SCHF funds vital clinical care, new equipment, training and education, groundbreaking research, and the construction of state-of-the-art facilities. Over the years, SCHF has contributed more than \$330 million to support these initiatives.

SCHF's impact is profound, with over 170,000 children receiving treatment or care each year from the services they support. The Foundation also runs various programmes and campaigns, such as the Sydney Sick Kids Appeal and annual events, to engage the community and raise necessary funds. SCHF's efforts extend to providing special experiences for children in hospitals and supporting families during challenging times.

**Shaw and Partners**  
**FOUNDATION**

**\$175,000**

**HAS BEEN DONATED TO THE WHAT ABILITY FOUNDATION BY SHAW AND PARTNERS SINCE 2015.**



### Partnership with the Beyond Blue Foundation

Beyond Blue is a prominent Australian mental health organisation established to support individuals experiencing anxiety, depression, and other mental health issues.

Founded in 2000, Beyond Blue offers a range of services including a 24/7 helpline, online chat, and email counselling. The organisation is dedicated to providing immediate support and resources for mental health, focusing on prevention, early intervention, and recovery.

Beyond Blue works collaboratively with governments, health services, educational institutions, workplaces, and the community to raise awareness and reduce the stigma surrounding mental health issues. Their programmes and initiatives aim to improve the mental well-being of all Australians, emphasising the importance of reaching out for help and maintaining mental health.

**Shaw and Partners**  
**FOUNDATION**

**Shaw**  
**and**  
**Partners**  
**Financial Services**

**Shaw and Partners has backed more than 500 charity initiatives since 2015.**





## Shaw and Partners raises over \$60,000 during Gotcha4Life 24H Row-Off

On 9 September 2024, Shaw and Partners proudly raised \$62,576 during the Gotcha4Life 24-Hour Row-Off, an event dedicated to promoting mental fitness and raising crucial funds for the Gotcha4Life Foundation.

The event saw an incredible “State of Origin” showdown between the Sydney and Melbourne offices, with staff, advisers, and management coming together to row for the cause. Whether rowing for a few minutes or cheering from the sidelines, the energy and camaraderie were truly inspiring.

### Olympians join the cause

A special highlight of the day was the participation of 10 Olympic athletes, including Riley Fitzsimmons, Noah Havard, Pierre and Jean van der Westhuyzen, Jackson Collins, Tom Green, Lani Pallister, Kaylee McKeown, James Tomkins, and Shaw and Partners’ very own Peter Foster. Their presence and support helped elevate the event to

another level, making it an unforgettable experience for everyone involved.

### A remarkable fundraising effort

thanks to the generosity of staff, advisers, and management, an impressive \$31,288 was raised in just three hours. This amount was matched dollar for dollar by the Shaw and Partners Foundation, bringing the total to \$62,576 for Gotcha4Life’s mission of building mental fitness across Australia.

### A huge thank you

Shaw and Partners extends a heartfelt thank you to everyone who participated, donated, and supported this initiative. Events like the Gotcha4Life 24-Hour Row-Off play a vital role in raising awareness and funds to support mental health programs that empower individuals to build resilience and strengthen emotional well-being.

**We are proud to continue our partnership with Gotcha4Life, ensuring that more Australians have access to the mental fitness resources and support they need.**





# Shaw and Partners FOUNDATION



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- 20. Team Sydney: Pierre van der Westhuyzen, Riley Fitzsimmons, and Lani Pallister (with medals) alongside Sydney office management team members George Deva and Chris Smith.
- 21. Team Melbourne: Jackson Collins, Jean van der Westhuyzen, and Tom Green proudly display their Olympic medals as they compete in the Shaw and Partners Row-Off!
- 22. Lisa Taranto, Tanya Dillon, and Widiana Setiawan proudly show off Olympic gold medals as Team Melbourne takes on Team Sydney.

- 23. The Sydney team celebrates after the Row-Off—all smiles for a great cause, despite losing to Melbourne!
- 24. Team Adelaide gears up for the Row-Off, bringing strength and spirit to the competition!
- 25. Pierre van der Westhuyzen and Noah Havard, in yellow, with Shaw and Partners Senior Investment Advisers Tom Weber and Tony Doyle, in pink.

## GOTCHA 4LIFE

# \$62,576

**DONATED TO THE  
GOTCHA4LIFE FOUNDATION**





## Shaw and Partners Sydney office raises over \$50,000 at the City2Surf



On 11 August 2024, the Shaw and Partners Sydney team proudly participated in the City2Surf, joining over 90,000 runners and walkers in the iconic 14km event. This year, the team ran in support of the Women's and Girls' Emergency Centre (WAGEC), a grassroots organisation dedicated to helping women and families in crisis and advocating for meaningful social change.

Thanks to the incredible generosity of the Shaw and Partners community and the Shaw and Partners Foundation, which matched every dollar raised, the team was thrilled to announce a \$51,950 donation to WAGEC.

Adding to the achievement, Shaw and Partners ranked as the fourth-highest fundraiser for the entire City2Surf event, reflecting the dedication, generosity, and strong community spirit within the firm.

### About the Women's and Girls' Emergency Centre

WAGEC provides critical support to those impacted by domestic violence, offering safe housing, crisis support, and advocacy to help families rebuild their lives. The funds raised will directly support programs and services that provide safety, security, and long-term opportunities for women and children in need.

### A huge thank you to everyone who contributed and a heartfelt congratulations to our team members who completed the race.

Your efforts have made a real difference, ensuring that WAGEC can continue its vital work in the community.

**\$51,950**

**DONATED TO THE WOMEN'S AND GIRLS' EMERGENCY CENTRE**

- 26. A big thank you to the Sydney office team, including Anthony Wilson, John Wardman, Brittany Hughes, Emma Tippet, Fraser MacLeod, James Seabrook, Connie Navarrete, Edward Hoare, Mike Crone, Chris Dorney, Sam Christie, Will MacPherson, Fiona Burton, John Lee, Graham Kaplan, Samantha Murray, Eric Farrales-Glorioso, Michael De Palma, Indira Sarker, Lindsay Archibald, and Laurie Ellis, for their incredible efforts at the City2Surf!
- 27. Indira Sarker, Emma Tippet, and Brittany Hughes beaming at the City2Surf finish line!





28



29

## Shaw and Partners Adelaide office raises over \$40,000 at the Bloody Long Walk



On 26 October 2024, the Shaw and Partners Adelaide office took on the 35km Bloody Long Walk, raising an incredible \$40,700 for the Mito Foundation. This remarkable achievement was made possible by the dedicated efforts of Team Dot, who raised over \$20,350, with the Shaw and Partners Foundation generously matching the amount.

This year marks the fifth consecutive year of Adelaide's commitment to supporting the Mito Foundation, bringing the total funds raised to over \$184,000 since 2020. The team walks each year in honour of Suzie Georgiou's daughter, Dot, who tragically passed away from mitochondrial disease at just seven months old.

A huge congratulations to the 52 walkers, joggers, support crews, and everyone who donated to make this event a success. Your support and dedication continue to make a

meaningful impact in raising awareness and funding vital research for mitochondrial disease.

### About the Mito Foundation

The Mito Foundation provides essential support to those affected by mitochondrial disease (mito), funds critical research into prevention, diagnosis, treatment, and potential cures, and works to increase awareness and education about this devastating condition.

A heartfelt thank you to everyone who has supported this cause over the years.

**An incredible group of Shaw and Partners colleagues and supporters is already committed to walking in Dot's honour again next year. Well done, Team Dot!**

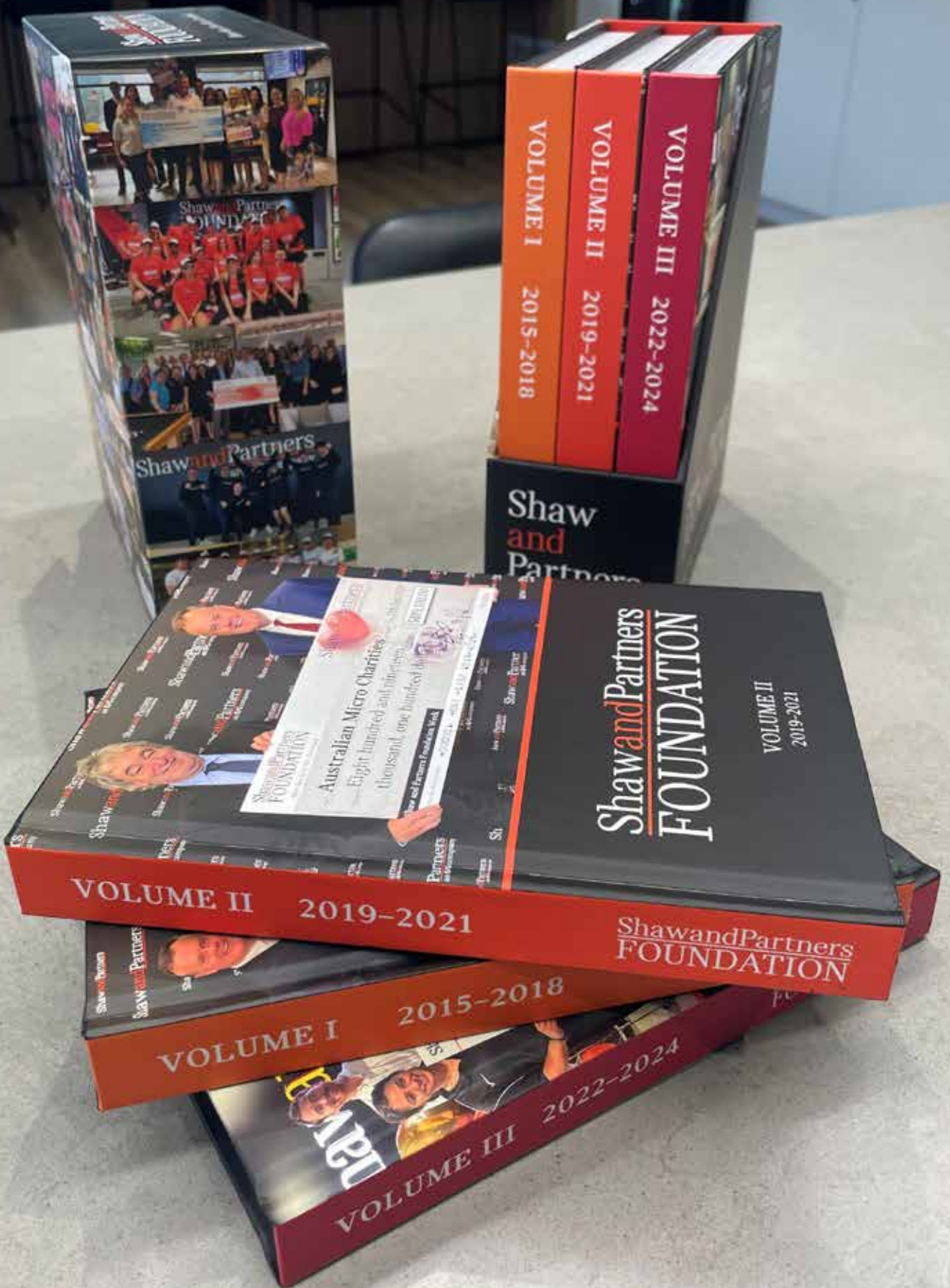
**\$40,700**

**DONATED TO MITO FOUNDATION SINCE 2020**

- 28. The Shaw and Partners Team Dot proudly celebrate after completing the Bloody Long Walk—52 strong walkers, joggers, and support crew, but only 15 lucky ones made the photo! Bright yellow fluoro shirts, big smiles, and all for a great cause supporting the Mito Foundation.
- 29. The Georgiou family proudly represents Team Dot at the Bloody Long Walk, raising awareness and funds for the Mito Foundation.



OCT 2024



**The Shaw and Partners Foundation Book.  
A legacy in print.**



# ShawandPartners Foundation Book

DOWNLOAD  
BOOKS



**A decade of giving captured in a special three-book set.**

We are proud to present the Shaw and Partners Foundation Book, officially launched in October 2024, as a special gift to all Shaw and Partners employees. This book is a visual celebration of our philanthropic journey since 2015, capturing the charity events, fundraising efforts, and heartfelt moments that have shaped our mission to support communities across Australia through financial contributions, volunteering, and skill-sharing initiatives.

With a strong focus on mental health, education, and social inclusion, the Shaw and Partners Foundation has donated over \$12 million to more than 300 Australian charities, surpassing our original goal ahead of schedule. This book is a testament to the incredible impact made possible by our Management, Advisers, and Staff, who continue to live by our motto: "Have fun. Live life. Give back."

**As we look ahead to our next milestone — raising and donating \$20 million by 2030 — we hope this book serves as a source of pride and inspiration for everyone at Shaw and Partners.**

Thank you for being part of this extraordinary journey!



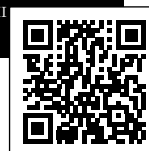
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**WE'RE ON  
TOUR WITH  
SOHN HEARTS  
& MINDS**

15 November 2024  
Adelaide's Festival Theatre  
[sohnheartsandminds.com.au](http://sohnheartsandminds.com.au)

# Shaw and Partners

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## Financial Services

## Shaw and Partners proudly supports the Sohn Hearts & Minds Conference in Adelaide

**On 15 November 2024, Shaw and Partners proudly supported the Sohn Hearts & Minds Conference as a Gold Sponsor, contributing \$52,000 towards this leading investment and philanthropy event.**

Held in Adelaide for the first time, the conference brought together global thought leaders and industry experts to explore investment opportunities while raising crucial funds for medical research.

The event was attended by Shaw and Partners CEO Earl Evans, National Head of Private Wealth George Deva, and a strong contingent from the Adelaide office, who joined the broader finance community in supporting this unique philanthropic initiative.

Funds raised from the event went towards supporting the Victor Chang Cardiac Research Institute, one of Australia's leading organisations in cardiovascular research and innovation.

Since its founding in 2016, Hearts & Minds has continued to bridge the gap between investment and philanthropy, serving as the exclusive Australian affiliate of the esteemed Sohn Conference Foundation.

Shaw and Partners is honoured to support an event that combines financial expertise with philanthropic impact, reinforcing its commitment to giving back to the communities in which it operates.

**Shaw and Partners looks forward to continuing its partnership with Sohn Hearts & Minds to drive meaningful change in Australian medical research.**

**\$52,000**

**DONATED TO THE  
VICTOR CHANG CARDIAC  
RESEARCH INSTITUTE**

- 30. Shaw and Partners Head of Equities Anthony Wilson (right) and SA State Manager Fraser MacLeod attend the Sohn Hearts & Minds Conference in Adelaide
- 31. Catch me if you can! Fraser MacLeod proudly represents Shaw and Partners at the New York Marathon.
- 32. Fraser takes on New York with style— arms wide, big smile, and ready to conquer the 42.2km
- 33. Going the distance—42.2km, \$10,225 raised, and a well-earned medal to show for it!





31



33



32

# Going the distance for mental health: Fraser MacLeod raises over \$10,000 at the New York Marathon

**Shaw and Partners SA State Manager, Fraser MacLeod, successfully completed the TCS New York City Marathon, raising an impressive \$10,225 for the Breakthrough Mental Health Research Foundation.**

Running in his bright Shaw and Partners top, Fraser tackled the iconic 42.2km course while championing a cause close to his heart.

A significant portion of his fundraising success came from the Shaw and Partners Foundation, which contributed \$5,000 as part of its dollar-matching initiative, amplifying the generosity of donors and making an even greater impact.

Reflecting on the experience, Fraser described the marathon as the highlight of a memorable week in the U.S., where post-election market movements saw U.S. stocks record their strongest week in a year.

However, the real victory for him was raising vital funds for mental health research.

**Congratulations to Fraser on his incredible marathon achievement and fundraising success, reinforcing Shaw and Partners' ongoing commitment to mental health research and community initiatives.**

**\$10,225**

**DONATED TO THE BREAKTHROUGH MENTAL HEALTH RESEARCH FOUNDATION**







From left: Shaw and Partners CEO Earl Evans, What Ability Founder Steve Dresler, Gotcha4Life Founder Gus Worland and Shaw and Partners Foundation Chair Russell Karlson

## Shaw and Partners donates \$50,000 to What Ability and Gotcha4Life

The Shaw and Partners WA Race Week Welcome Dinner was an unforgettable evening, bringing together over 170 guests, including Shaw and Partners management, advisers, elite athletes, and the paddling community, to kick off the biggest week in ocean ski paddling history.

Shaw and Partners CEO Earl Evans opened the event with a warm welcome, followed by an engaging Q&A session with Paris 2024 Olympic medallists and Shaw and Partners brand ambassadors Riley Fitzsimmons and Jean van der Westhuyzen. Hosted by Gotcha4Life founder Gus Worland, the discussion highlighted the resilience, dedication, and mindset required to compete at the highest level.

The event also spotlighted Steve Dresler, founder of What Ability, who shared the inspiring mission of his organisation—empowering individuals with disabilities by connecting them with professional

athletes as support workers. After an early retirement from sport due to injury, Steve turned adversity into purpose, creating a community that fosters inclusion, empowerment, and support.

The most impactful moment of the evening came when the Shaw and Partners Foundation presented two \$25,000 donations, totalling \$50,000, to What Ability Foundation and Gotcha4Life Foundation.

**This contribution reinforces Shaw and Partners' commitment to community support, mental health advocacy, and inclusivity.**

**\$25,000**

**DONATED TO WHAT ABILITY**

**\$25,000**

**DONATED TO GOTCHA4LIFE**











**What Ability** 

**WA RACE WEEK**  
**Shaw and Partners**  
 Financial Services

## Making waves for disability inclusion with What Ability & Shaw and Partners

Shaw and Partners has proudly supported What Ability, an NDIS-registered disability support service, for several years. Founded by former NRL player Steve Dresler, What Ability is dedicated to fostering inclusion by engaging professional and semi-professional athletes as support workers. Their mission is simple yet powerful—bringing happiness and a sense of belonging to those they support.

### A morning of fun and inclusion at Sorrento Beach

On Tuesday, 26 November 2024, Sorrento Beach in Perth was filled with energy, excitement, and connection as Shaw and Partners partnered with What Ability for the third consecutive year during the annual WA Race Week. This special event welcomed children and adults living with disabilities for a morning of beach activities, creating an inclusive and joyful environment.

We were also delighted to welcome members of the Sorrento Surf Life Saving Club's Dolphin Program, who eagerly joined the session, adding to the sense of community and camaraderie.

### Elite athletes leading the way

Leading the activities were Shaw and Partners Brand Ambassadors, including Lana Rogers, Hannah Sculley, Jemma Smith, Piper Harrison, Ali Day, Tom Green, Jake Morris, Riley Fitzsimmons, and Kendrick Louis.

From board paddling and swimming to beach flags and ball games, the day was filled with laughter, enthusiasm, and unforgettable moments, highlighting the power of sport in bringing people together.

### A commitment to inclusion and giving back

As a long-term supporter of What Ability, Shaw and Partners reinforced its commitment at the WA Race Week

Welcome Dinner. In a special moment of generosity, Shaw and Partners CEO Earl Evans presented What Ability founder Steve Dresler with a \$25,000 donation, further empowering his mission to expand national support for individuals with disabilities.

### Three years of partnership, a lifetime of impact

Three years of partnership between Shaw and Partners and What Ability have demonstrated the transformative power of inclusion, sport, and shared experiences. These events create lasting memories and reinforce the importance of celebrating ability, resilience, and joy—a testament to what can be achieved when communities come together.







# Hutt St Centre



## Shaw and Partners Adelaide office serves up kindness at Hutt St Centre

**The Shaw and Partners Adelaide office embraced the true spirit of giving this Christmas season by stepping up as Angels for a Day at the Hutt St Centre, a vital community hub supporting people experiencing homelessness.**

The team not only helped prepare and serve meals but also donated food to feed 160 people, ensuring those in need received a warm and nourishing meal. Their generosity was further amplified by the Shaw and Partners Foundation, which matched every dollar donated, bringing the total contribution to approximately \$2,000 in goods and funds.

Additionally, to further support the Hutt St Centre's mission of helping individuals rebuild their lives, rediscover their identities, and reconnect with loved ones, the Shaw and Partners Foundation provided an additional \$5,000 donation.



**A heartfelt thank you to everyone who contributed to making this initiative a success.**

- 34. From left: Matthew White, Matthew Wilkinson, Jed Richards, Suzie Georgiou, Fraser MacLeod, and Scott Dawson (in yellow) with a Hutt St Centre volunteer.
- 35. Shaw and Partners Senior Investment Adviser Toby Jefferis (second from left) and WA State Manager Russell Karlson present a donation at the Foodbank WA Warehouse.
- 36. A festive display of gifts surrounds the Christmas tree at the Perth office, bringing joy to the holiday season.
- 37. The Canberra office joins in the spirit of giving with generous gift donations.

**\$7,000**

**DONATED TO THE HUTT ST CENTRE**





35



36



37

## Shaw and Partners spreads holiday cheer through Christmas food drive and donations

As the festive season approached, Shaw and Partners reaffirmed its commitment to supporting those in need through its annual Christmas Food Drive, benefiting Foodbank Australia and Roundabout Canberra.

### Supporting Foodbank Australia

Over several weeks, collection points were set up in Shaw and Partners offices, encouraging team members to donate non-perishable food, hygiene products, and festive treats to assist families in need. In addition to these donations, the Shaw and Partners Foundation contributed \$5,371 to further support Foodbank's mission to combat hunger across Australia.

As the country's largest food relief organisation, Foodbank provides more than 70% of the food rescued for food relief programs, supporting charities and school breakfast programs nationwide.

### Helping families through Roundabout Canberra

This year, Shaw and Partners also supported the Roundabout Canberra End of Year Donation Drive, an organisation dedicated to ensuring every child has a safe start in life. Shaw and Partners Advisers and staff members donated school supplies and toiletries, helping to ease the financial burden for Canberra families preparing for the new school year.

Roundabout Canberra has provided assistance to over 4,000 children in 2024, delivering essential baby and children's items to families in need. Shaw and Partners is proud to contribute to their mission, ensuring that every family receives the dignity and support they deserve.

### A collective effort of generosity

Shaw and Partners extends its deepest gratitude to all staff members who contributed to the Christmas Food Drive and donation initiatives. Your generosity and commitment to giving back have made a tangible impact, bringing comfort, joy, and relief to many families during the festive season. Thank you!



**\$5,371**

**DONATED TO FOODBANK**





1st prize winner: Tony Doyle (right)



2nd prize winner: Connie Navarrete



3rd prize winner: Lisa Nguyen



Masquerade Party for the Shaw and Partners Sydney Office

## Best-dressed winners at the iconic Sydney Office Christmas Party

The holiday season kicked off with the Shaw and Partners Sydney Office Christmas Party, where winners of the Best-Dressed Competition generously donated their prize money to a charity of their choice.

**Shaw and Partners Senior Investment Adviser, Tony Doyle, the first prize winner, donated \$5,000 to Shake It Up Australia.**

“Supporting Shake It Up Australia is deeply personal to me. Parkinson’s disease affects countless Australians and their families, and funding research is crucial in the search for a cure. Shake It Up Australia is at the forefront of this mission, driving innovative research and pushing the boundaries of what’s possible. I’m honoured to contribute to a cause that offers hope and progress to those impacted by this condition.”

**Shaw and Partners Dealers Assistant, Connie Navarrete, the second prize winner, donated \$3,000 to Pet Rescue.**

“Every animal deserves a second chance, and Pet Rescue is making that a reality by connecting rescue animals with loving homes. Their commitment to reducing euthanasia rates and providing care to vulnerable pets is something I deeply admire. By donating to Pet Rescue, I hope to support their incredible work in giving these animals the safe, happy futures they deserve.”

**Shaw and Partners Sydney Office Manager Lisa Nguyen, the third prize winner, donated \$2,000 to Deaf Children Australia.**

“Deaf Children Australia plays a vital role in empowering children who are deaf or hard of hearing, helping them navigate a world that isn’t always built with their needs in mind. Their advocacy, support

services, and educational programs make a real difference in the lives of so many young people. This donation is my way of contributing to their mission and ensuring that every child, regardless of their hearing ability, has access to opportunities to thrive.”

**“At Shaw and Partners, we believe in more than financial success. We believe in having fun, living life, and giving back.”**

**\$10,000**

**DONATED BY BEST-DRESSED WINNERS**





Shaw and Partners Senior Investment Advisers Jenny Rachmat, Andrew Foster, Damien Warner, Mark Palmer, Stuart Beattie, Sherman Chua and Rachael Green (behind the cheque) together with St John WA staff members.

## Shaw and Partners supports First Nations Healthcare professionals with \$50,000 donation

**Shaw and Partners is proud to support First Nations healthcare professionals through a \$50,000 donation via the Shaw and Partners Foundation, funding scholarships for Indigenous nurses pursuing a Graduate Diploma of Paramedicine at The University of Notre Dame Australia in partnership with St John WA.**

The scholarships, valued at \$10,000 each, will cover full tuition fees for students in Commonwealth Supported Places at Notre Dame's Fremantle campus. This initiative aims to enhance emergency healthcare capacity in First Nations communities by providing registered nurses with advanced paramedic training.

Notre Dame's National Director of Partnerships and Community Engagement, Associate Professor Clive Walley, emphasised the significance of this initiative, stating it will make a "real difference" in the lives of Aboriginal

and Torres Strait Islander students. St John WA's First Nations Relationship Specialist, Jeremy Maitland-Smith, highlighted how the program will help expand culturally responsive healthcare services, ensuring highly skilled clinicians serve regional communities.

Through this partnership, Shaw and Partners continues its mission to instil meaningful change in Australian society, strengthening Indigenous healthcare and community resilience.

**\$50,000**

**DONATED TO ST JOHN WA**













# Shaw and Partners FOUNDATION

Have fun. Live life. Give back.

## Charities supported by the Shaw and Partners Foundation in 2024

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3rd Space	Fragile X	St George Clinical School Spine Service
Adara Development	Fred Hollows	Starlight Children's Hospital Foundation
Angel Flight Australia	Gotcha4Life Foundation	Sydney Children's Hospital Telethon7
Apex Foundation	Happiness Co Foundation	The Abbie Basson Sarcoma Foundation
Australian Fund Managers Foundation	Hurt to Help	The Farm in Galong
Autism Swim	Hutt St Centre	The Male Hug
Backpack 4 Vic Kids	JDRF	The Mirabel Foundation
Barnardos Australia	Karinya House	The Peter MacCallum Cancer Foundation
Bear Cottage	Kick Start for Kids	The Project Rokit Foundation
Beefy's Charity Foundation	Kids Giving Back	Variety - The Children's Charity
Breakthrough	Koala Kids Foundation	Victor Chang Cardiac Research Institute
Breast Cancer Research	Leukaemia Foundation of Australia	Villa Kitty Foundation
Breast Cancer Trials	Fight MND	Voiceless
Camp Quality	Mark Hughes Foundation	Warrior Woman Foundation
Canberra Hospital Foundation	Mito Foundation	What Ability Foundation
Cancer Council	Olivia Newton-John Cancer Wellness & Research Centre	Williams Syndrome Association
Challenge Cancer Support Network	One Meal - It Makes a Difference	Women and Infants Research Foundation
Charlie Teo Foundation	Ovarian Cancer Research Foundation	Women's Community Shelter
Women's and Girls Emergency Centre	OzHarvest	Women's and Girls' Emergency Centre
ConFit Pathways	Pain Australia	Youth Opportunities SA
Cystic Fibrosis	Primary Club	Zero2Hero
D. Berich Cancer	Project Kindness	
Fight Parkinson's	Puddle Jumpers SA	
Fitted for Work	Push for Better	
Flicker of Hope	RSPCA	
Foodbank	Rare Cancers Australia	
Forster Neighbourhood Centre	Relove	

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