



ANNUAL REVIEW 2020



ABOUT THE IA FOUNDATION

The Insurance Advisernet Foundation was established in 2015 as a way to consolidate the considerable goodwill that already existed amongst our Authorised Representatives across Australia. We feel very fortunate to be part of a dynamic and successful business. The Foundation will remain part of our ongoing commitment to our people, our clients and the wider community.



Why does the IA Foundation *exist*?

The IA Foundation exists to support local Australian organisations that work to help change the lives of individuals, families and communities for the better.

What does the IA Foundation *do*?

The IA Foundation reaches out to our adviser practices, insurers and business partners who have the passion, commitment and social conscience to help those more disadvantaged than themselves. Individually and collectively, advisers identify not-for-profits that are deserving of donations and in many cases, give their time and skills.

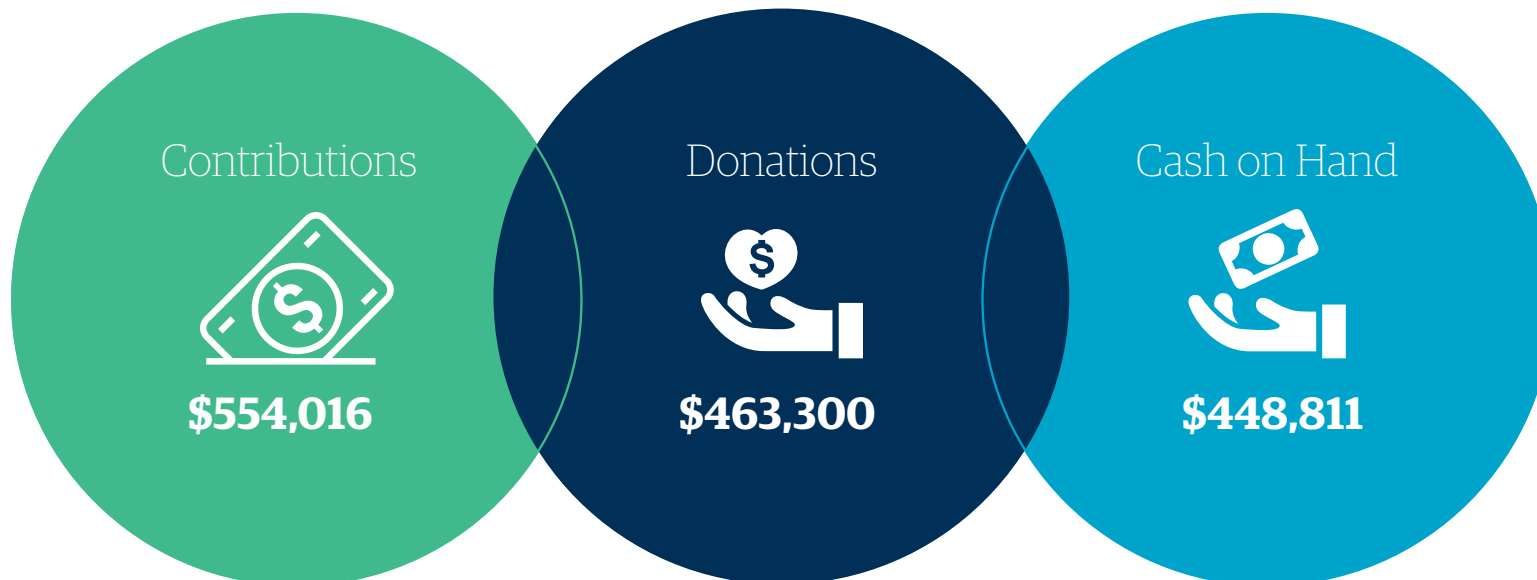
How does the IA Foundation *donate*?

Donations are given directly to community not-for-profits and/or charities and each year the IA Foundation strives to make a difference!

OUR IMPACT IN 2019/20

*Helping to **change** the **lives** of individuals,
families and communities for the **better**.*

Insurance Advisernet and its Foundation has contributed over \$2 million over the last 5 years to over 30 different charities. We aim to donate over \$400,000 each year through a variety of fundraising initiatives. By working closely with our staff, advisers and our insurance underwriting partners we aim to leave a social legacy for generations to come.





The Insurance Advisernet Foundation are delighted to confirm our contributions, donations and cash on hand all continued to grow during 2019/2020.

2019/2020 has been an unprecedented and turbulent year which has seen fires, storms, floods and of course, COVID-19.

We are extremely proud to advise we have made donations of \$463,300 to over 30 registered charities whilst keeping our administration costs to less than 1% (\$4,735).

The concept of giving back to individuals and/or organisations is very powerful and clearly resonates with our Insurance Advisernet culture and values.

We are committed to continuing to “make a difference”.

Ian Carr
Chairman

REACHING
out IN THE
community

DONATIONS GRANTED
IN 2019 AND 2020



SAHMRI

The SAHMRI (South Australian Health and Medical Research Institute) is an independent flagship organisation dedicated to improving health outcomes, both in Australia and around the world. One of their research areas is Heart Health and IA is proud to provide a range of insurances to SAHMRI for the multiple clinical trials being conducted by this department. In fact, it was the provision of these insurances that led to IA donating a further \$25,000 to SAHMRI to actively support one of their Peripheral Arterial Disease Projects.

This funding follows on from last year's donation which supported their Heart Health Program.

Approximately 1 in 5 patients with peripheral arterial disease will suffer a major adverse cardiovascular event over a 12-month period. Atherosclerotic risk factors in patients with PAD are disappointingly under recognised and under-treated in the community. This disease burden is expected to increase significantly over the next 20 years due to our aging population and our changing risk factor profiles.

This project examines the effects of medical and lifestyle therapy on symptoms, functional capacity, quality of life and cardiovascular health compared with standard treatment.

With the generous support of IAF, SAHMRI have been able to investigate many aspects of peripheral artery disease. From this research, they have identified significant gender differences in mortality. Understanding the factors contributing to this discrepancy is essential. We believe this is key to improving care for all patients with this condition.

\$25,000
Donation

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The IA donation of \$25,000 will help to pay for vital research into PAD.



\$50,000+
Donations

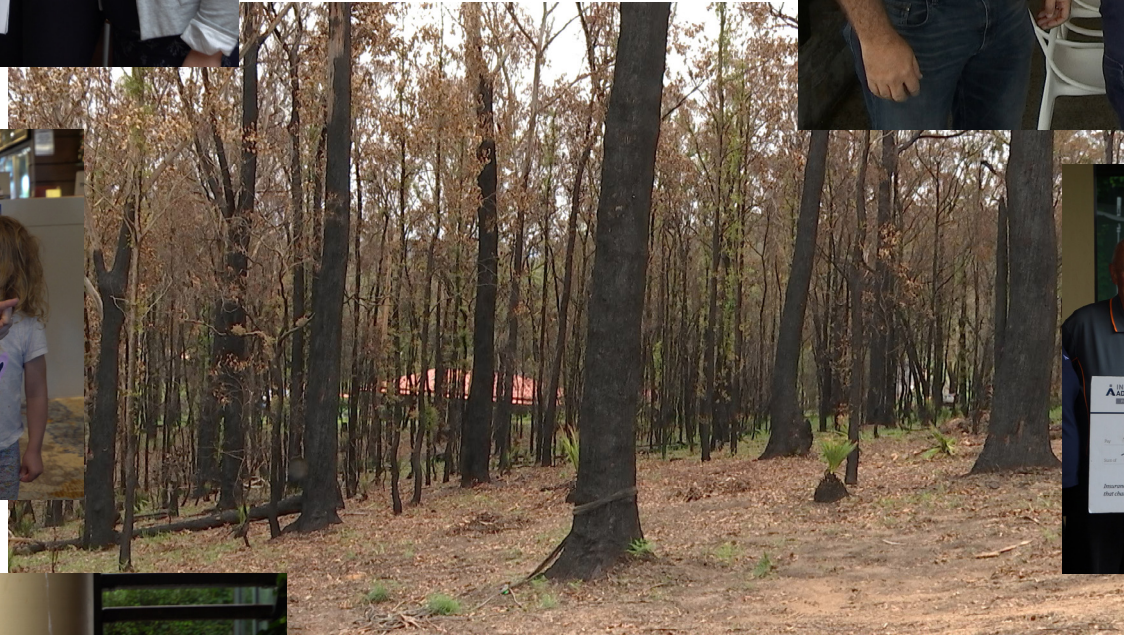
BUSHFIRE AFFECTED REGIONS

Insurance Advisernet and one of their Insurer partners, TravelCard, travelled early last month through bushfire affected towns on the NSW South Coast (starting in Batemans Bay, traveling onto Mogo, Moruya, Bermagui, Cobargo and culminating at Merimbula). We were fortunate enough to have Travelcard's corporate ambassador Catriona Rowntree with us given our purpose was to demonstrate these towns are "open for business" following the damage sustained.

The IA Foundation also took the opportunity to donate funds to hard-working local charities involved in the community's recovery where over \$50,000 was donated to worthy groups assisting this cause.

We encourage anyone thinking of their upcoming holidays (when it is safe to travel) to consider these wonderful coastal and historic towns as well as any other catastrophe affected townships across the Country.





8

ADVICE YOU
CAN TRUST





\$62,500
Donation

JDRF

JDRF is the largest charitable funder and advocate of Type 1 Diabetes (T1D) research in the world. Their aim is to raise enough money so that this disease and its complications will not only be treated effectively, but also prevented and even cured in the near future. Known as the silent pandemic, Diabetes Australia estimates that 280 Australians develop diabetes every day with 10% suffering from T1D (85% suffer from Type 2 Diabetes and 5% from gestational diabetes).

Each year, JDRF stages the 'JDRF One Walk', a month long challenge whereby participants walk 120,000 steps to support 120,000 Australians living with T1D to help raise research funds and the Insurance Advisernet (IA) Foundation is very happy to continue its support of this event. IA first became involved in 2016, donating \$10,000 to 'Hayley's Heroes', a fundraising team organised by IA Authorised Representative Simon Feldman of Sound Insurance Services in Melbourne.

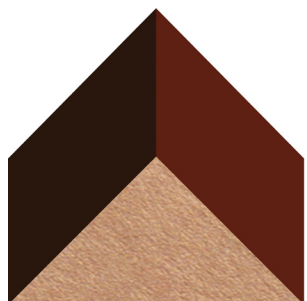
Simon's young daughter was diagnosed with T1D in 2014 when she was just 11 years old, and Hayley's Heroes takes part in the JDRF One Walk every year to help raise money for research.

JDRF continually strives to improve the lives of people suffering from T1D by funding national and international research with the express aim of eradicating this disease. To date, this organisation has raised \$2.25billion for research, with \$152m million invested in Australian research.

The IA Foundation is a strong supporter of our community and takes great pleasure in continuing its support of this worthy cause.



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donating \$10,000 to 'Hayley's Heroes',
a fundraising team organised
by IA Authorised Representative
Simon Feldman of Sound Insurance
Services in Melbourne.*



**Australian
Men's Shed
Association**

SHOULDER TO SHOULDER

MEN'S SHED ASSOCIATION

Recently, the Insurance Advisernet Foundation and Everest Risk Group, once again, made a donation of \$50,000 to the Australian Men's Shed Association (AMSA), a non-profit organisation operating out of Newcastle. Having spoken passionately about the work being performed by AMSA, the Foundation was elated to once again be able to assist in the continued running of the AMSA program.

AMSA was established in 2007 by the Australian independent community-based Men's Sheds as a body to represent, support and promote the continued Men's Shed movement. It was founded on the principle of sharing information between Sheds and those communities wishing to establish and operate a Men's Shed.

AMSA provides practical support to Men's Sheds, delivering a wide range of services with the aim of improving the health and wellbeing of members to reduce the number of men who are at risk from preventable health issues which may emanate from isolation. The Australian Men's Shed Association prioritises the well-being of all men by providing a safe, friendly, and welcoming place for men to work on meaningful projects and to contribute to the wider community.

\$50,000
Donation

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AMSA was established in 2007 by the Australian independent community-based Men's Sheds as a body to represent, support and promote the continued Men's Shed movement.



\$10,000

BRISBANE
YOUTH
SERVICE

NEW FUTURES FOR YOUNG PEOPLE

brisyouth.org

With a vision to provide 'New Futures for Young People', BYS has been operating in Fortitude Valley since 1977.

BRISBANE YOUTH SERVICE

Brisbane Youth Service supports homeless and disadvantaged young people (aged 12-25 years) and their children, to secure and maintain housing. We provide emergency support and a range of services to assist young people to address physical & mental health issues, establish successful relationships & support networks and access pathways to education & long term employment

The much needed funds will be used to support homeless and at-risk young people who are in crisis to create new and better futures. On hand to present the cheque was Authorised Representative, Tyrone Shandiman.



\$5,000
Donation



mylifehouse.org.au

CHRIS O'BRIEN LIFEHOUSE

Founded in 2017 by husband and wife Arron and Jenna-Lea Clark, SurFebruary is a charity event that inspires participants to catch a wave a day throughout February. Participants are encouraged to raise money for cancer care in partnership with Chris O'Brien Lifehouse.

Recently, the IA Foundation were pleased to donate \$5,000 to the Chris O'Brien Lifehouse on behalf of SurFebruary. The \$5,000 donation was presented to Dr Judith Lacey who is the Head of Supportive Care and Integrative Oncology at Chris O'Brien Lifehouse, accompanied by Matthew Counsel from Altius Group, Jenna Clark from SurFebruary and Sophie Beer of Insurance Advisernet.

The Chris O'Brien Lifehouse is a not-for-profit, comprehensive cancer hospital. From screening to prevention, diagnosis, treatment and wellness, they specialise in advanced care for patients with cancer, including the most rare and complex cases. Each year they treat over 57,000 patients from across Australia, using the latest technology in a modern, purpose-built hospital.

The funds donated by the IA Foundation will go towards providing evidence-based complementary therapies in partnership with clinical care delivered by Chris O'Brien Lifehouse. Given the expense of cancer treatment, these funds will provide access to those who otherwise could not afford it.



If you would like to get involved and support this worthy cause and the change they are making to cancer care, head to their Facebook page.



\$5,000
Donation

Amity
Community Services Inc

amity.org.au

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*Amity Community Services
is an incorporated non-
government community
organisation providing a
range of services pertaining
to behaviours of habit.*

AMITY NT

Amity is an incorporated non-government organisation that helps to support the well-being of people within the community. Specifically, this charity helps people who are either experiencing or likely to experience the negative consequences of their own or someone else's lifestyle choices.

At IA, we believe that one of our most important roles is to support our community, which is why we endorse a wide variety of charities. Established in the 1970s, Amity has been an IA client since 1998. At the same time, one of IA's Northern Territory principals, Brett Hagan, has twice been the Chair of Amity over the past twenty years, and is still an active board member today.

So it is with great pleasure that Brett Hagan, on behalf of IA, presented Amity with a cheque for \$5,000. This donation will help Amity to support a range of programs focused on supporting people within our community to live a more balanced and healthy life.

With the health of the community as their primary focus, Amity has adopted the definition of 'health', as suggested by the World Health Organisation: that health is more than just the absence of disease, it's a combination of mental, physical, emotional and spiritual wellbeing. Taking this definition even further, Amity suggests that health is a resource for life, being a product of both lifestyle and living conditions.

Amity recognises that a community is composed of many different lifestyles, all imposing costs and benefits on the community as a whole, and to the individuals who live within that community. However, they also acknowledges that when particular lifestyles result in negative consequences to the community and to individuals, trying to change the behaviours that led to these negative outcomes can often be futile.



\$10,000
Donation



epilepsyqueensland.com.au

EPILEPSY QLD

The IA Foundation were very pleased to present a cheque for \$10,000 to Wally Lewis on behalf of Epilepsy Queensland Inc. at our annual conference in November last year. Epilepsy QLD work hard to increase awareness and support people within the community by providing education and counselling to those affected.

Epilepsy Queensland is dedicated to optimising the quality of life of people with epilepsy and their carers/families through information, support, counselling, education, training, NDIS support, advocacy and research. They also offer in-service training and workshops for health, disability and education organisations so they are better placed to help people with epilepsy.

They aim to increase public awareness and raise community understanding of epilepsy. Epilepsy occurs in one in 50 people and yet there are many misconceptions. Our National campaign to raise awareness occurs in March each year culminating in Purple Day on 26 March.



Our mission is to bring epilepsy out of the shadows and to optimise life for people touched by epilepsy.

DONATIONS

\$15,000+

Below you will find just some of the donations we have made in the past financial year.



JDRF

(Juvenile Diabetes Research Foundation)

The world's leading supporter of Type 1 diabetes research.



Men's Shed Association

Prioritises the wellbeing of all men by providing a safe, friendly and welcoming place for men to work on meaningful projects and to contribute to the wider community.



Royal Flying Doctors Service

The Royal Flying Doctor Service is one of the largest and most comprehensive aeromedical organisations in the world, providing extensive primary health care and 24-hour emergency service to people over an area of 7.69 million square kilometres.

SAHMRI

(South Australian Health & Medical Research Institute)

An independent flagship organisation dedicated to improving health outcomes, both in Australia and around the world.



Starlight

To brighten the lives of seriously ill children and their families.



Top Blokes Foundation

Promotes the wellbeing of young men in Australia, aged from 11 to 24 years of age with a vision of ensuring that young men are happy, healthy and safe within their communities.



Reach

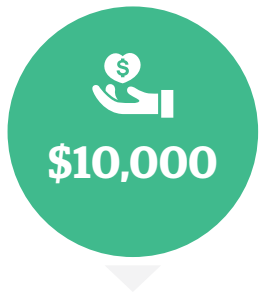
Run workshops to get young people talking and break down barriers to give them tools and skills to understand themselves and others better.

Merimbula Chamber of Commerce

The Merimbula Chamber of Commerce aims to support local businesses by developing and fostering economic growth, supporting the needs of local businesses and members.

DONATIONS

\$10,000



Leukodystrophy Australia

Provides vital advocacy and financial assistance, as well as counselling and family networking services for sufferers of over 40 different genetic neurological conditions, or leukodystrophies.

Bega Valley Suicide Prevention

The Bega Valley Suicide Prevention Action Network (SPAN) facilitates community mental health education, encourages help-seeking behaviour and promotes partnerships which enhance community connectedness and wellbeing.

Epilepsy QLD

Epilepsy Queensland exists to help people with epilepsy live their best lives and bring epilepsy out of the shadows.

Foster Care Angels

Foster Care Angels are committed to supporting, empowering and creating opportunities for vulnerable young people.

Friends of the Koala

Friends of the Koala is committed to conserving koalas and preserving their habitat, particularly in the Northern Rivers region of NSW.

Brisbane Youth Service

They support homeless and disadvantaged young people (aged 12-25 years) and their children, to secure and maintain housing. They provide emergency support and a range of services to assist young people to address physical & mental health issue.

DANII Foundation

DANII Foundation supports all people living with DIABETES by raising awareness of WHAT is TYPE ONE.

Kids Xpress

KidsXpress is a specialist trauma focused organisation dedicated to improving life chances for our country's most vulnerable children and youth.

Menslink

Supporting young males by providing short-term counselling, encouraging them to speak up and long term mentoring.

Shake It Up

Shake It Up Australia Foundation promotes and funds Parkinson's disease research in Australia aimed at better treatments and ultimately a cure.

Long Beach Rural Fire Brigade

Shake It Up Australia Foundation promotes and funds Parkinson's disease research in Australia aimed at better treatments and ultimately a cure.

DONATIONS

\$5,000



ACL Disability Services

ACL Disability Services is a not-for-profit organisation that provides support to people with mild to moderate learning disabilities.

Beyond Blue

Beyond Blue provides information and support to help everyone in Australia achieve their best possible mental health, whatever their age and wherever they live.

Foodbank QLD

Foodbank is Australia's largest food relief organisation, operating on a scale that makes it crucial to the work of the front line charities that are feeding vulnerable Australians.

Pancare

Pancare's purpose is to increase survival and provide support to people affected by pancreatic cancer and other upper gastrointestinal cancers.

Amity Community

Amity Community Services is an incorporated non-government community organisation providing a range of services pertaining to behaviours of habit.

Black Dog Institute

The Black Dog Institute team is dedicated to understanding, preventing and treating the significant mental health challenges that we face nationally and globally.

Headway ABI

Headway ABI Australia Ltd (Headway ABI) is a local, Not-for-profit organisation supporting people in the Gold Coast community who have an Acquired Brain Injury (ABI).

Riding for the Disabled

Organises recreational horse riding for people with disabilities, providing close supervision, personal helpers, specially designed facilities and equipment.

Austism Spectrum AU

Aims to understand, engage & celebrate the strengths, interests & aspirations of people on the autism spectrum.

Chris O'Brien Lifehouse

Chris O'Brien Lifehouse is a not-for-profit, comprehensive cancer hospital in Camperdown, Sydney. From screening to prevention, diagnosis, treatment and wellness, we treat all types of cancer, specialising in those that are complex and rare.

OzHelp Foundation

Through a range of practical and proactive health and wellbeing programs and services, OzHelp empowers and supports employees to grow life skills and resilience, to engage in self-care, and to look out for each other, before there is a crisis.

Sacred Heart Mission

Sacred Hearts mission is to build people's capacity to participate more fully in community life, by addressing the underlying causes of deep, persistent disadvantage and social exclusion.

DONATIONS

<\$5,000



\$3,000 - Disabled Surfers Associaton

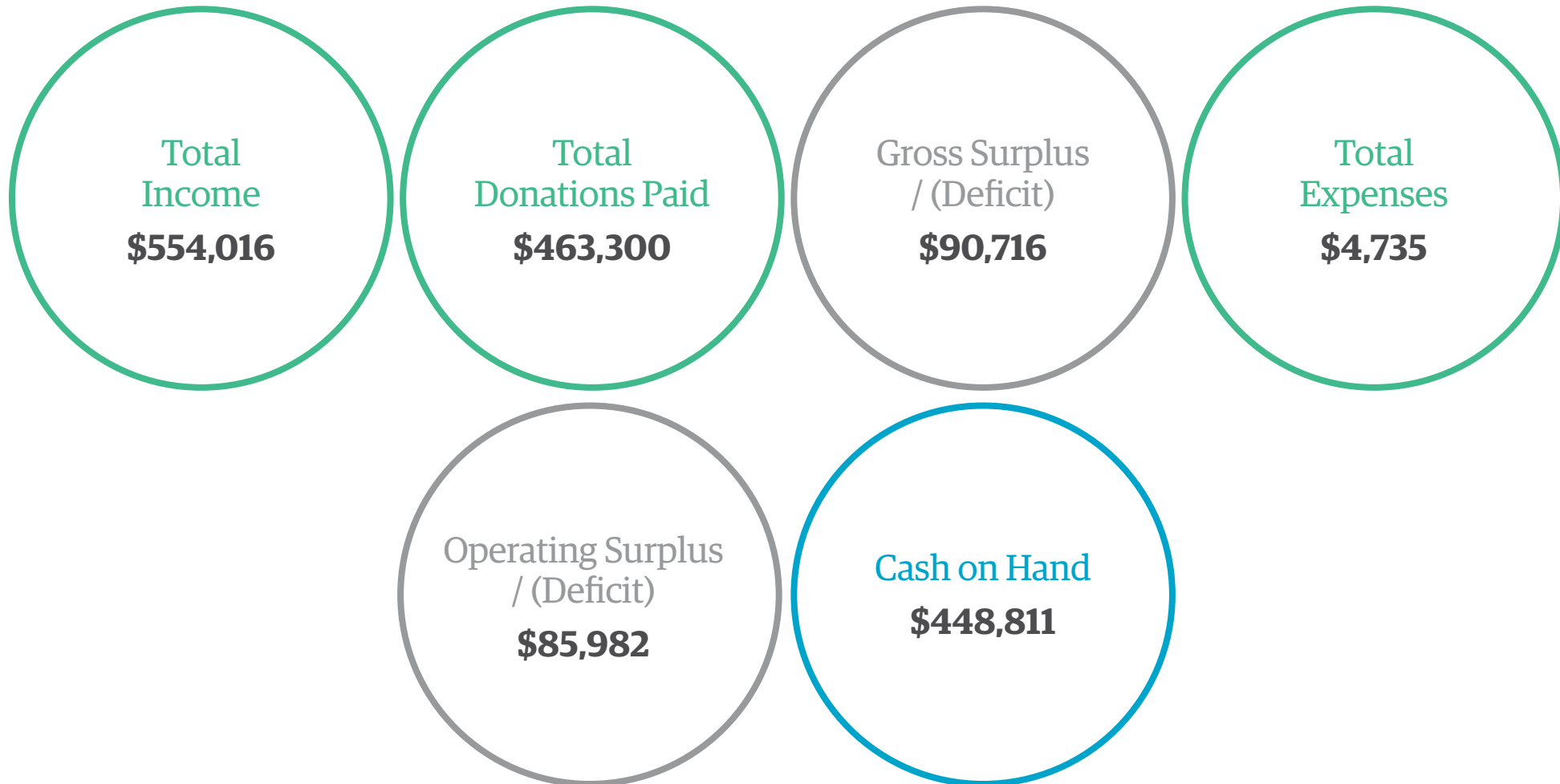
The Disabled Surfers Association was established in 1986 by Gary Blaschke after a motorcycle accident which he lost his kneecap and underwent extensive rehabilitation. Gary saw a void that needed to be filled as over the years, many surfers with disabilities have unfortunately, been loners with no one to help them get back into the water.

\$1,500 - Helping Hands Mission

Helping Hands Mission Inc. operate seven Op Shops across Melbourne and regional VIC, enabling them to provide emergency aid to hundreds of families each week.

YEAR TO DATE INCOME STATEMENT

June 2020



WITH THANKS TO

Our Supporters

WE COULDN'T DO IT
WITHOUT YOU!

PRINCIPAL CORPORATE SUPPORTER



MAJOR CORPORATE SUPPORTERS



MAJOR INDUSTRY SUPPORTERS




2019/2020 SUPPORTERS

ADA Plus Pty Ltd	Carr Corporate Pty Ltd	Everest Risk Group Pty Ltd	Insurance Business Solutions Pty Ltd
Allinsure	Ceejaze Management & Consulting Pty Ltd	Ford & Associates Pty Ltd	Insurefix Pty Ltd
ALH Insurance Services Pty Ltd	Clear Insurance Pty Ltd	Fordsure Pty Ltd	Irecon Insurance Services Pty Ltd
Allan Insurance Services Pty Ltd	Coastal Insurance Services Pty Ltd	Fortress Risk Pty Ltd	James Germantis
Amanda Homann Pty Ltd	Collegial Insurance Services Pty Ltd	Gerotola Pty Ltd	James McLaren Pty Ltd
Andrew Borden	Commercial Risk Solutions Pty Ltd	Gibbscorp Pty Ltd	James Wilson Insurance Solutions Pty Ltd
Antietam Financial Services Pty Ltd	Complete Risk Solutions Pty Ltd	Graeme E Huxley Pty Ltd	JM Insurance Services Pty Ltd
Assurance Corp (Aust) Pty Ltd	Corvus Insurance Advisers Pty Ltd	Greg Arms	Joanne Day
Astute Insurance Services Pty Ltd	D&D Insurance Services Pty Ltd	Guzzy Pty Ltd	John Skidmore
Bay Insurance Solutions Pty Ltd	David Burroughs	Heathdale Insurance Services Pty Ltd	KLP Insurance Services Pty Ltd
BCRM Pty Ltd	D.R. Loades Enterprises Pty Ltd	I Marine & General Insurance Services Pty Ltd	KSLR Pty Ltd
Beaches Insurance Pty Ltd	DBA Insurance Risk & Management Services Pty Ltd	Indemnity Solutions Pty Ltd	Lewis Insurance Services Pty Ltd
Bresland Insurance Group	Doreen Insurance Solutions Pty Ltd	Insurance Advisernet Australia	Macquarie Insurance Services
Bygrave Insurance Consultants Pty Ltd	ERCJ Investments Pty Ltd	Insurance Advisernet Merimbula Pty Ltd	Mark Lee

2019/2020 SUPPORTERS CONT.

McDonald Insurance Solutions Pty Ltd	Professional Insurance Solutions Pty Ltd	Shaun Standfield
McQueen General Insurance Pty Ltd	R & C Ping Pty Ltd	Simon Elliot
Navis Vitae Pty Ltd	R & R Insurance Advisers Pty Ltd	Sound Insurance Services Pty Ltd
Neil Carter	RDC Insurance Advisers Pty Ltd	Steve Dymond
Noah Insurance Pty Ltd	Restart Insurance Management Services Pty Ltd	Sydney Risk Solutions Pty Ltd
Optimum Insurance Pty Ltd	Risk Advisory Australia Pty Ltd	Vantage Insurance Solutions Pty Ltd
Pace Insurance Pty Ltd	Sajmo Pty Ltd	Ventures Insurance Advisors Pty Ltd
Pacific Insurance Solutions Pty Ltd	Sarah Farmborough	Vince Insurance Professionals Pty Ltd
Partenaire Solutions Pty Ltd	Scott Saunders Pty Ltd	Warwick Pratt Insurance Services Pty Ltd
Pender Insurance Holdings Pty Ltd	Sean McDermott	Westside Insurance Specialists Pty Ltd
Peter Thompson Insurance Pty Ltd	Shandit Pty Ltd	Woodridge Insurance Services Pty Ltd
Petro Consulting Services Pty Ltd		



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FOUNDATION