



# ANNUAL REVIEW 2019



# 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.

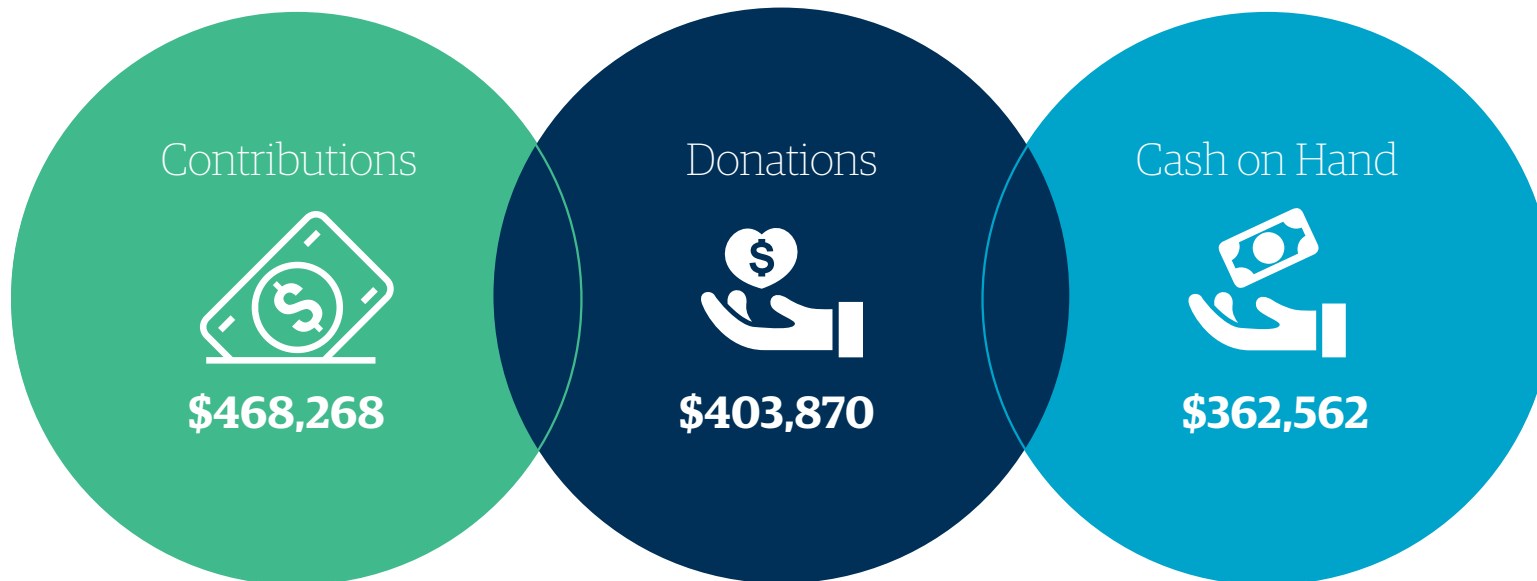
## *How* does the IA Foundation *donate*?

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 2018/19

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

Insurance Advisernet and its Foundation has contributed \$2.5 million over the last 10 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 2018/2019.*

We made donations of **\$403,870** to over 30 registered charities whilst keeping our administration costs to less than 1% (\$5,903).

Insurance Advisernet Foundation was extremely proud to receive the "Best Community Engagement Program of the Year" at the 2019 Insurance Business Awards.

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

We look forward to continuing to "make a difference".

**Ian Carr**  
Chairman

REACHING  
*out* IN THE  
*community*

DONATIONS GRANTED  
IN 2018 AND 2019





**\$25,000**  
Donation



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

# SAHMRI

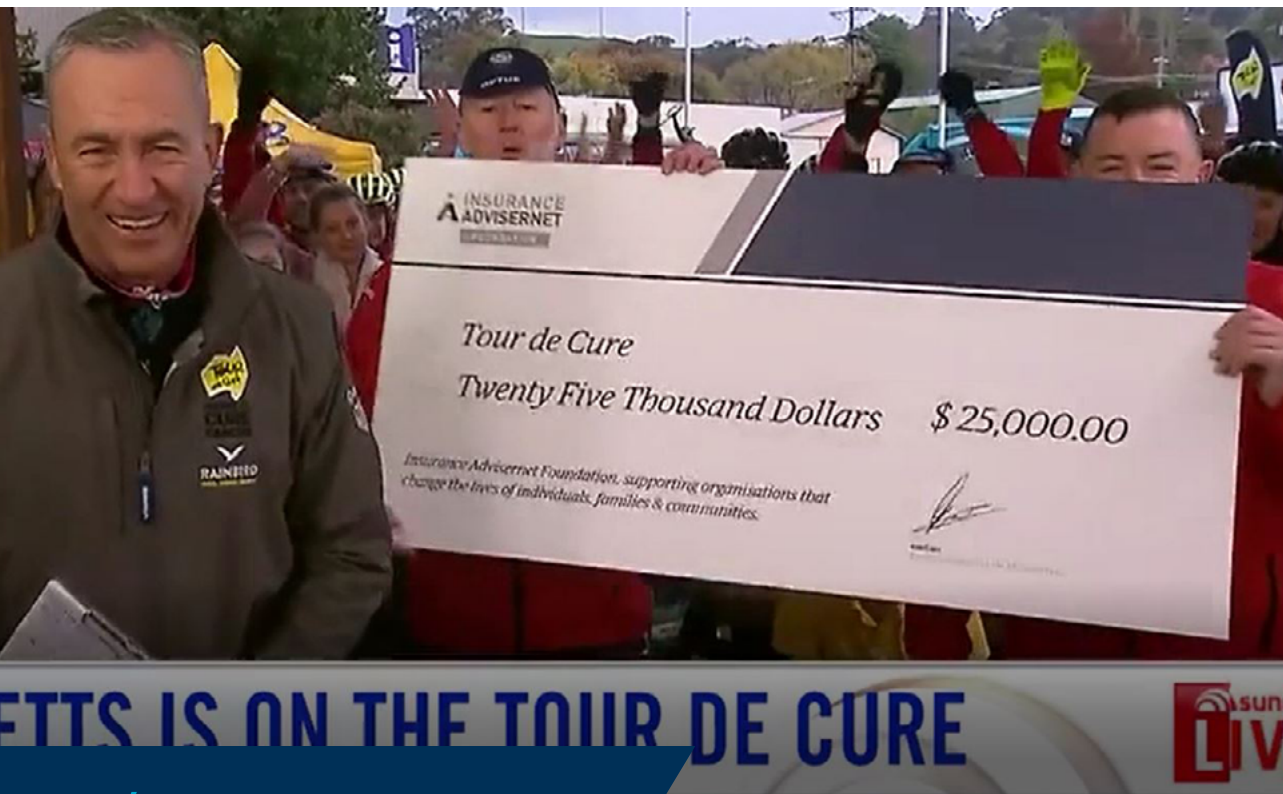
The SAHMRI (South Australian Health and Medical Research Institute) is an independent flagship organisation dedicated to improving health outcomes, both in Australia and around the world. One of their research areas is Heart Health and IA is proud to provide a range of insurances to SAHMRI for the multiple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

This funding follows on from last year's donation and our Founder and Chairman, Ian Carr and Authorised Representative, Wayne Trezona, were on hand to present this cheque to SAHMRI CFO, Barry Porter, Tony Ashdown, the SAHMRI Development Manager, Dr Sam Parva and Deb Coelho. The \$25,000 donation by IA will support ongoing Heart Health research led by Professor Steve Nicholls that aims to improve the treatment of patients with PAD (Peripheral Arterial Disease).

It is well known that people with PAD are likely to suffer from vascular complications of the lower limbs, for example intermittent claudication (cramping pain in the legs), ulceration of the lower limbs and amputation. Unfortunately, people who suffer from PAD are less likely to receive guideline-directed therapies to treat known risk factors when compared to people who suffer from coronary artery disease or cerebrovascular disease, despite having similar levels of mortality and morbidity.



*The IA donation of \$25,000 will help to pay for the costs of ECGs, 24 hour holter monitoring, and blood analyses for each of the participants in the study.*



**\$25,000**  
Donation



**RIDING TO  
CURE  
CANCER**

*Tour de Cure has raised \$50 million, funded 306 world-class cancer projects and achieved 25 significant cancer breakthroughs.*

[tourdecure.com.au](http://tourdecure.com.au)

## TOUR DE CURE

Tour de Cure is a non-profit organisation that organises tours and events across Australia to fund pioneering Australian cancer projects. The Insurance Advisernet Foundation (IA) is pleased to support Tour de Cure once again this year by making another \$25,000 donation to help fund the work of Australian scientists who have dedicated their lives to uncovering a cure for cancer.

This donation was facilitated by Gareth Jones, Principal of Partenaire Solutions, and an Authorised Representative of IA. Like most Australians, Gareth has been personally affected by cancer so he's passionate about supporting Tour de Cure. He's participated in numerous riding tours and has personally fundraised a significant amount of money for cancer research, support and prevention projects.

Due to the IA Foundation's generous donation again this year, the TDC created an IA riding team which we were fortunate enough to have AFL and Swans legend Tony 'Plugger' Lockett be a part of. Tony was inspired to take part in this year's TDC from watching their documentary earlier this year. Since 2007, Tour de Cure has raised \$50 million, funded 306 world-class cancer projects and achieved 25 significant cancer breakthroughs. The organisation has also helped to educate more than 110,000 Australian primary school children about cancer awareness and prevention through its Be Fit, Be Healthy, Be Happy program.

The Tour de Cure Signature Tour is its flagship event, but there are a variety of shorter tours and events in different locations across Australia each year. There are numerous ways to get involved with Tour de Cure, including riding, volunteering, fundraising or simply by making a personal or company donation.

IA fully supports and encourages the efforts of staff members like Gareth Jones, who selflessly give of their own free time to support organisations like Tour de Cure. In honour of Tour de Cure's mission to find a cure for cancer, IA are very proud to make their \$25,000 donation to this inspiring and well-deserving charity.



**\$25,000**  
Donation



[dylanalcottfoundation.com.au](http://dylanalcottfoundation.com.au)

*The work Dylan does for young people with disabilities is amazing; he's a fantastic advocate for his Foundation and we hope to continue assisting Dylan with his charity work.*

# DYLAN ALCOTT FOUNDATION

The Dylan Alcott Foundation is a charitable organisation that aims to help young people (under 25 years of age) who are struggling to come to terms with a disability to fulfil their dreams. With more than 4.3 million people living with a disability in Australia (more than 18% of the population), the work performed by this charitable Foundation provides a lifeline to young wheelchair bound Australians.

Supporting the community is one of Insurance Advisernet's (IA) fundamental principles, so we were delighted when Dylan Alcott attended our annual conference as a keynote speaker in Canberra at the end of October 2018. He spoke about his incredible journey and the stigma attached to people in wheelchairs and how the perception of disability needs to change in Australia.

At the end of Dylan's keynote, Ian Carr, Founder and Chairman of Insurance Advisernet and the Insurance Advisernet Foundation, walked on stage to advise Dylan that the IA Foundation would like to donate \$25,000 for his Foundation's work. To say that Dylan was shocked is an understatement, but he was also extremely grateful for IA's financial support of young disabled Aussies.

Ian says, "The work Dylan does for young people with disabilities is amazing; he's a fantastic advocate for his Foundation and we hope to continue assisting Dylan with his charity work".

This Foundation relies on donations from individuals and organisations to help young Australians with a disability overcome the barriers they face in life. Specifically, it assists young people to participate in sports and further education by providing mentorships, scholarships and grants.

For example, sporting equipment that is too expensive for individuals to purchase alone, education at leading institutions, and mentoring by some of our industry greats.





**\$25,000**  
Donation



[jdrf.org.au](http://jdrf.org.au)

*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.*

## 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. This year (2018), Simon and his team, once again, participated in this event and was thrilled when the IA Foundation donated an additional \$25,000 to Hayley's Heroes, as part of their fund raising efforts.

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. In 2017, this organisation raised \$11.7 million with \$8.5 million raised via fundraising events, such as the JDRF One Walk.

The IA Foundation is a strong supporter of our community and takes great pleasure in continuing its support of this worthy cause. This year, we are delighted to donate \$25,000 to Hayley's Heroes, bringing the total amount donated over the last 3 years to \$50,000. We hope that our joint contribution will hasten a positive outcome for people suffering with this devastating disease.



**\$50,000**  
Donation

*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.*



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

## MEN'S SHED ASSOCIATION

Recently, the Insurance Advisernet Foundation and Everest Risk Group 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.

On hand to receive the cheque from IA Chairman Ian Carr, MD Shaun Standfield, AR Sean McDermott & AR Anthony Anastasio (from IA Corporate Authorised Representative, Everest Risk Group), were Melissa White (Member Manager) & David Helmers (Executive Officer).





**\$7,460**  
(2 Donation)



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

*Team Rubicon was founded in the US in 2010, where it has proven to be a powerful tool for veteran reintegration.*

## TEAM RUBICON

Insurance Advisernet were proud to present Team Rubicon and their CEO Geoff Evans, with a cheque for \$1,060 last week in Sydney, brought about by Authorised Representative, Leigh Moulden.

Team Rubicon Australia (TRA) was founded in Sydney in 2016, and has since spread to Melbourne, Brisbane and Townsville, with many other locations currently being scoped. TRA unites the skills and experience of military veterans with emergency first responders to rapidly respond to natural disasters in Australia and around the world. In doing this work veterans regain a sense of purpose, community and identity.

Leigh met Geoff on Kokoda in 2013 and bonded over the 6 ½ days even shacking up next to each other some nights in the various huts! Recently Geoff was head hunted to start Team Rubicon here in Australia to get veterans back working and using their skills to assist in crisis situations (Proserpine floods and right now NSW Farmers drought).

Team Rubicon was founded in the US in 2010, where it has proven to be a powerful tool for veteran reintegration. Since 2010, the Team Rubicon model has expanded to Canada, the UK and Norway. Team Rubicon represents a significant departure from traditional veterans' organisations in that veterans join Team Rubicon to continue to serve others. Responding to natural disasters provides veterans the opportunity to grow beyond their military service.

More broadly TRA aims to change the narrative around what it means to be a veteran in Australia from victim, to highly valued civic asset, with skills and experience to be harnessed.

# DISABLED SURFERS ASSOCIATION

We are excited and privileged to volunteer and continue our sponsorship of Disabled Surfers Association (DSA) Ocean Grove. Initially set up for injured surfers in 1986, today the DSA caters for all disabilities and supports anyone who is keen to have a go at surfing. DSA's goal is to provide people with any disability with the opportunity to experience the sheer thrill of catching a wave. With the Great Ocean Road region of Victoria being home to some of Australia's most famous surf breaks, the events at Ocean Grove Main Beach are a memorable way to experience this rush.

We recently assisted DSA with the required purchase of two brand new G Boards, used at the latest DSA OG surfing event 02/02/2019 at Ocean Grove Beach. The new boards provided some great additional buoyancy, enjoyed by the 102 awesome surfers and 244 volunteers assisting.

With all the participants having different disabilities, the DSA Surfers are without a doubt the bravest and most genuine surfers to ever enter the Ocean. The DSA mantra of "Smiles on Dials" is extremely evident in the fantastic photos of the Surfing event days - check out Disabled Surfers Ocean Grove on Facebook to see the enjoyment shared by all in attendance, surfers and volunteers alike!



**\$1,710**  
Donation



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

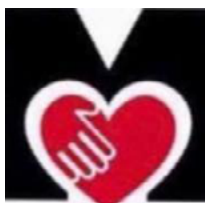
*The DSA mantra of "Smiles on Dials" is extremely evident in the fantastic photos of the Surfing event days.*







**\$2,500**  
Donation



@TheMovementGoldCoastHO

## THE MOVEMENT GC

The Insurance Advisernet Foundation, along with one of our valued Authorised Representatives, David Wormald, are very proud to support THE MOVEMENT Gold Coast, presenting them with a cheque of \$2,500. Sadly, the rate of homelessness in Australia has increased 4.6 per cent over the last five years (ABS 2016). The Movement Gold Coast was set up to help those in need, or those experiencing financial hardship, by offering assistance of food hampers, clothing and furniture (when they can). The mainstay of their assistance is the weekly meals they provide on Tuesday evenings in Labrador, and Thursday evenings and Saturday mornings in Surfers Paradise, thanks to the input of many volunteers.

David became involved with the registered not for profit group via a long-time client who also occupies the downstairs area of his office. Their office has become an unofficial drop off for anyone wanting to donate food or goods and their boardroom is often overtaken with food hampers, particularly around Christmas time!

“

*If you would like to get involved and support this worthy NGO and the change they are making to the homeless community of the Gold Coast, head to THE MOVEMENT Facebook Group.*

# DONATIONS

## \$25,000+



### Act for Kids

Act for Kids is an Australian charity providing free therapy and support services to children and families who have experienced or are at risk of child abuse and neglect. They have helped thousands of children and families for over 30 years. Act for Kids operates over 26 centres with a team of over 350 staff from Adelaide all the way up to the Cape York Peninsula.



### 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.



### Beyond Blue

Provides information and support to help Australians achieve their best possible mental health, whatever their age and wherever they live.

### Dylan Alcott Foundation

The Dylan Alcott Foundation is committed to helping young Australians with disabilities overcome the barriers of entry to sport and education by providing fundraising for grants, scholarships and mentoring.

### JDRF

(Juvenile Diabetes Research Foundation)

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

### Prostate Cancer Foundation of Australia

To make discoveries that will reduce the impact of prostate cancer on Australian men, their partners and families, recognising the diversity of the Australian community.

### SAHMRI

(South Australian Health & Medical Research Institute)

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

### Tour De Cure

A not-for-profit organisation that organises tours and events across Australia to fund pioneering Australian cancer projects.

# DONATIONS

## \$10,000 – \$15,000



### 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.



### 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.

### Reach

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

### Shake It Up

Shake It Up Australia Foundation is a not-for-profit organisation established in 2011 and in partnership with The Michael J. Fox Foundation (MJFF) promotes and funds Parkinson's disease research in Australia aimed at better treatments and ultimately a cure.

### Soldier On

Soldier On's mission is to work side by side with those who serve and protect Australia, and their families, helping them to secure their futures.

### Starlight Foundation

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

# DONATIONS

## \$0 – \$9,000



### Team Rubicon

Team Rubicon Australia unites the skills and experiences of Australian Defence Force veterans with first responders to rapidly deploy emergency response teams around the globe.



### 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.



### Helping Hands

Helping Hand is a not-for-profit organisation offering home care services, retirement living and residential care homes to over 7,000 clients in metropolitan and regional South Australia.



### \$1,710 - Disabled Surfers Association

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.

### Pancare

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

### Love me Love You

Love Me Love You is a non-profit organisation that strives to empower and build resilience in young adults so that they may overcome the stigma surrounding mental health and other life hardships.

### Soul Café

Provides free meals to some of Newcastle's most disadvantaged community members - many of are homeless, have a mental illness, substance abuse issues or live in poverty

### The Movement GC

THE MOVEMENT Gold Coast is a registered not for profit charity set up to help those in need, or those experiencing financial hardship. They offer assistance of food hampers, clothing and furniture when they can.

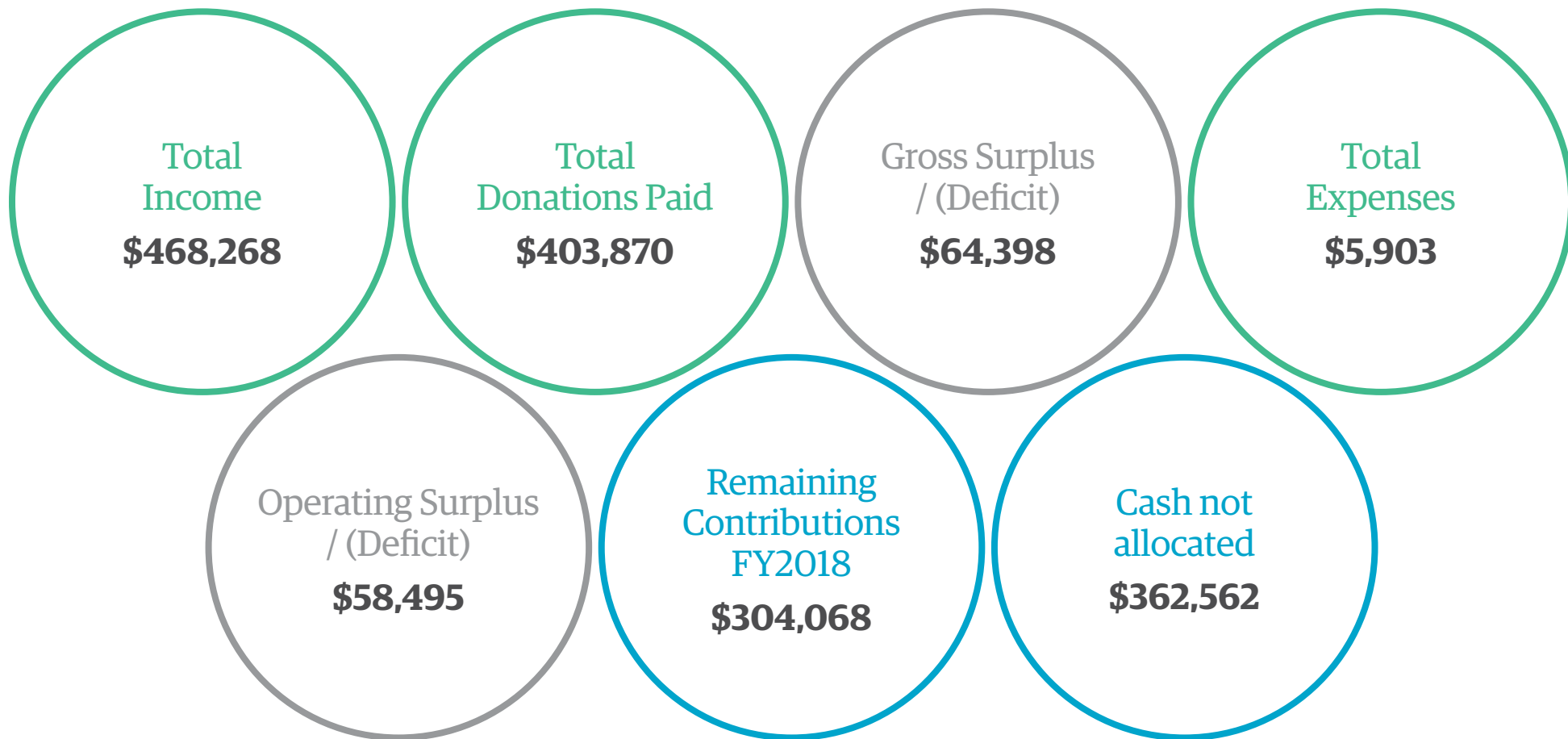
### \$1,000 - OzHelp


The OzHelp Foundation Ltd (OzHelp) was established in 2001 after David O'Bryan, a young building apprentice from Canberra, took his own life. That same year, three others who were connected to the ACT building and construction industry died by suicide within a three-month period.



# YEAR TO DATE INCOME STATEMENT

June 2019





# **INSURANCE ADVISERNET**

**FOUNDATION**