



Pitcher Partners Melbourne

Charitable Committee Annual Report



Contents

01	Chair's report
02	About us
03	Supporting community
04	Pro bono and low bono support
05	Charity profile: The Hanna Foundation
06	Charity profile: Sea Shepherd Australia Limited
07	Corporate social responsibility
08	Community leave
10	Charity profile: Muscular Dystrophy Association
11	The Pitcher Partners Charitable Fund
14	Impact summary
15	Governance
16	Meet the teams driving change

Cover image: Supplied by Muscular Dystrophy Association.

Disclaimer: The material contained in this report is general commentary and pertains only to Pitcher Partners Melbourne. None of the material is, or should be regarded as, advice. Efforts have been made to maintain accuracy at the date of publication. Pitcher Partners, its Principal and agents accept no responsibility for any error or omission, or for any loss arising from the use of this information.

Note: Pitcher Partners Melbourne is not a registered not-for-profit organisation. The activities outlined in this report form part of the firm's Corporate Social Responsibility program, and all financial contributions are made in conjunction with registered charities and not-for-profit organisations. Any use of the term Pitcher Partners refers to Pitcher Partners Melbourne firm.

Chair's *report*

As a firm, we're proud to present Pitcher Partner's Melbourne's sixth Charitable Committee report, detailing our collective efforts to support the community.

At Pitcher Partners, we believe in making business personal. For us, this means supporting our people and our clients, but extends further into supporting the communities where we can drive positive impact.

With the ongoing economic pressures facing communities, we know that it's more important than ever to give back. Over this last financial year, we have been fortunate to continue supporting local charities. One way that we do this by providing eligible clients and causes with both pro bono and low bono professional advice. This gives our people the opportunity to provide our services and expertise to help organisations drive impactful change and champion meaningful causes.

In addition, paid volunteer days give our people the chance to play an active role in supporting charities, whether it be rolling up their sleeves for an afternoon blood donation or a shift on the meal preparation team in the FareShare kitchen.

Looking ahead, we are excited about the prospects of furthering our impact. We will focus on key causes and educational opportunities, ensuring that our contributions make a significant difference. In particular, we hope to continue providing scholarships, awarded by the Pitcher Partners Charitable Fund to support young individuals aspiring to careers in accounting and advisory. The Committee's work is a testament to the collective effort of our staff, clients, partners, and volunteers. Together, we are making a meaningful difference.

We're grateful too for the support of the numerous not-for-profit organisations and volunteers that we have worked with this financial year. You all play an important role in supporting our community. Thank you for your contributions.

Mark Harrison

Mark Harrison

Chair – Charitable Committee





About *us*

The Pitcher Partners Charitable Committee (PPCC) was established to provide the governance structure to our Melbourne firm's community impact efforts. The projects and support that we deliver are driven by the goals of Pitcher Partners Melbourne and its leaders.

Vision

Our vision is for Pitcher Partners Melbourne to continue operating with integrity, not only in the business community, but through making a meaningful impact on the people, organisations and communities we operate in. We're big picture thinkers, and we know that means building an impact strategy that's big picture too. One that puts care at the centre, helping good people to keep doing what they do and achieving great outcomes for the community.

Purpose

We know we couldn't do what we do without our people. And we also know that 'our people' extends beyond our staff. It includes our clients and the communities they help and are invested in. And we're committed to helping our people make an impact. For us, that means supporting initiatives that care for the people, places, and communities close to our hearts.

The role of the PPCC is to ensure all contributions are made within agreed operating principles and guidelines. The Committee oversees the full scope of our charitable contributions including:

- Pro bono and low bono work
- Corporate Social Responsibility (CSR) initiatives
- Pitcher Partners Charitable Fund donations, scholarships and grants
- Other community support opportunities we might engage in over the year

Our target

For every hour worked by our people, Pitcher Partners Melbourne aims to contribute \$1 toward impactful community initiatives. **The goal in 2023–24 was to contribute \$1.24 million in support, and we achieved \$1.52 million**

We achieved
\$1.52m



Our *values*



Energy

Find a way
and make it
happen



Care

Put people
at the heart
of everything
we do



Courage

Make brave
choices and
challenge the
status quo



Honesty

Build trust
and do what
is right



One firm

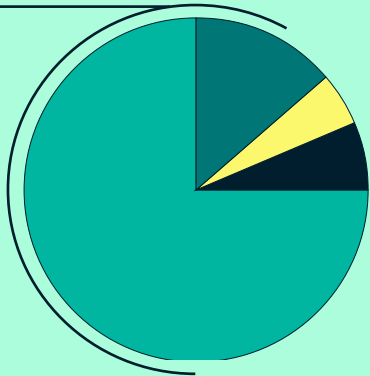
Work and
lead as
one team

Supporting *community*

As a firm, we know one size doesn't fit all when we support our clients. That's why we support our charitable initiatives in variety of ways, too.

How we *give back*

During 2023–24 more than **\$1,520m** in charitable support was provided in the following areas:



- \$209,000** *CSR*
Providing donations and running office events to raise funds and gather supplies and essentials for those in need
- \$75,000** *Educational support*
Providing scholarships for the next generation
- \$97,000** *Volunteer time*
Lending a helping hand
- \$1,140,000** *Professional support*
Extending our expertise to support organisations doing great work

Melbourne



Corporate social responsibility

\$209,000

contributed to impactful causes through internal fundraising initiatives



Educational support

\$75,000

paid through The Pitcher Partners Charitable Fund, to provide scholarships for students studying in accounting and related fields



Professional support

\$1,140,000

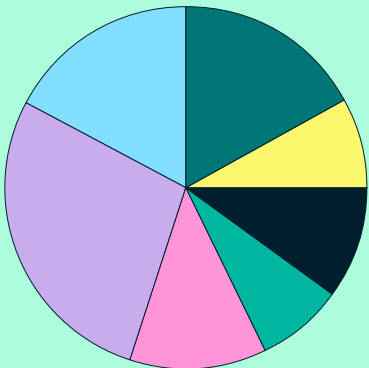
of pro bono and low bono work was provided, leveraging our expertise to support organisations making a difference



Volunteer time

\$97,000

467 hours of employees working time donated to eligible organisations and causes



Support by category

- 17%** Community
- 8%** Disability
- 10%** Education
- 8%** Environment
- 12%** Financial disability
- 28%** Health
- 17%** Youth at risk



Pro bono and low bono *support*

Our people are empowered to make a difference in several ways, including supporting organisations through pro bono and low bono work.

Keeping an organisation running can be challenging and take significant resources. These organisations leverage their expertise and provide services to make a difference. So we do too, providing our expertise either free or at highly discounted rates (up to 90%) so they can use their resources to continue making an impact

During the 2023–24 period, we provided pro bono and/or low bono services to more than 75 not-for-profit organisations valued at \$1,140,000.

Some of the organisations supported included:

Australian Women Donors Network

FareShare

Hanna Foundation

Kindred Spirits Enterprises

Kinfolk Enterprise

Koorie Academy Basketball

Lighthouse Foundation

My Room Children's Cancer Charity

Muscular Dystrophy Australia

Palliative Care Australia

Refugee Migrant Children's Centre

Scleroderma Victoria Incorporated

Sea Shepherd Australia

Smiling Mind

Sweet Justice

The Bridge of Hope Foundation

The Council to Homeless Persons

The Grace Tame Foundation

The Venny

Tour De Cure

Uncle Bob's Club

Wallara Australia

Western Community Legal Centre

Youth Junction Incorporated



During the *2023–24 period*, we provided pro bono and/or low bono services to

>75

not-for-profit organisations valued at

\$1,140m



Charity profile *Hanna Foundation*

Mental health is something that can impact everyone, at any time. Everyone should have access to mental health support and the Hanna Foundation is doing incredible work to make Australia's leading mental health programs accessible to those most vulnerable.

There are many communities, often made up of vulnerable minorities who lack the resources to engage with vital education and training programs to support strong mental health. That's where the Hanna Foundation steps in, with money raised used to deliver mental health programs into these communities to encourage conversation, recognition and positive action both for those impacted by mental health conditions, and those around them.

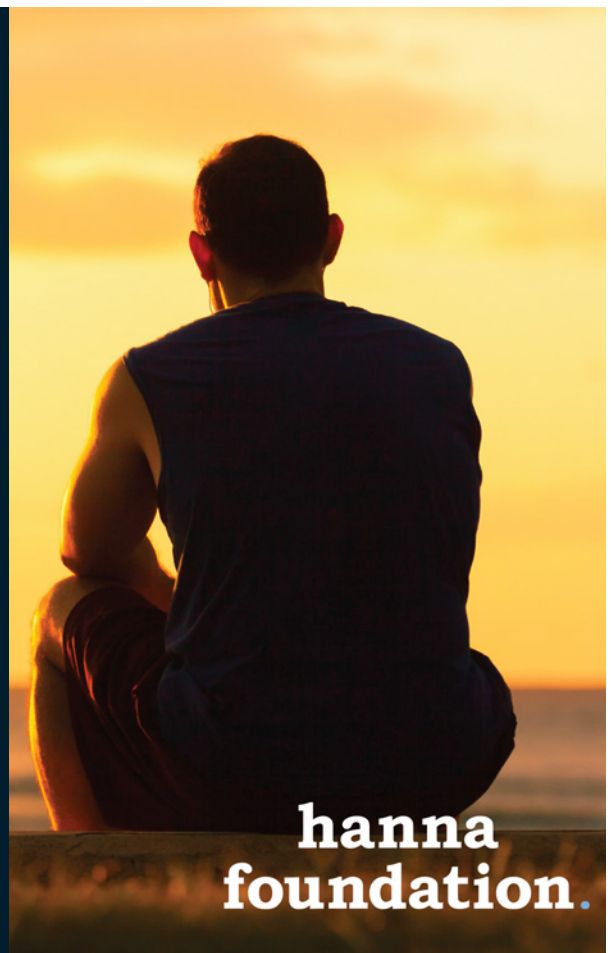
Our pro bono professional support includes providing rent-free office space, so the Foundation can continue delivering the work as part of its vital mission. Peter Braine, Partner in the Pitcher Partners Melbourne Business Advisory and Assurance practice also stands as a voluntary Director of the charity.

Support provided: *Pro bono professional services*



Pitcher Partners has been a major supporter since day one back in 2019, providing resources and capability to establish the foundation through to ongoing governance, tax, compliance and business advisory services. The support of Pitcher Partners with the expertise, passion and commitment led by Peter Braine has enabled Hanna Foundation to exist and deliver outcomes sustainably and for the long run. Our sincere thanks and appreciation.

Brendan Wright
Co-Founder and Director – Hanna Foundation





Charity profile

Sea Shepherd Australia Limited

Sea Shepherd Australia protects the biodiversity of the world's ocean and marine wildlife. They use direct action such as patrolling the high seas and working with national authorities when existing laws are not enforced to address overfishing, illegal fishing, environmental waste, and poaching.

Founded in 1977 by Captain Paul Watson in Vancouver, Canada, Sea Shepherd's movement now has independent entities in over 20 countries. In 2013, Sea Shepherd Global was established to coordinate campaigns outside the USA. Each of their vessels and the activities of the Sea Shepherd movement around the world work towards the mission of defending, conserving, and protecting marine life.



Sea Shepherd is a lean, effective movement for the ocean and we have greatly appreciated the assistance of Pitcher Partners, as a critical service for Sea Shepherd Australia, providing assurance to our Board, donors and regulatory authorities that our financial affairs are in order.

Pitcher Partners' professionalism adds credibility, technical expertise and good governance to Sea Shepherd Australia, and while providing discounted services, allows our crews to be out there longer, keeping our ships and crews on the frontline in defence of marine life. Sea Shepherd wants all the team at Pitcher Partners to know that our victories for the ocean, humanity's primary life support, are as much theirs as our crews on the frontline.

Jeff Hansen
Managing Director – Sea Shepherd Australia

Corporate *social* *responsibility*

Events are a big part of how we connect at Pitcher Partners. Always looking for creative ways to give back, our people dug deep and supported a range of social causes during the financial year.

With the help of our CSR Committee, a calendar of creative fundraisers was delivered. The result? Staff donations totalling over \$11,000. People contributed through:



Christmas raffle

More than \$4,500 was raised through raffle ticket sales, and donated to The Smith Family to help disadvantaged children celebrate Christmas.



Winter coat and blanket drive

Staff made donations to guess the number of lollies in the jar and funds were matched by the firm, with the total raised going to 300 Blankets. Staff also donated a collection of coats and blankets to ‘Off Your Back’.



Movember bake sale

More than \$1,500 was raised through a firm bake sale and donated to the Movember Foundation, supporting life-changing men’s health treatments and medical research.

*In addition, Pitcher Partners Melbourne contributed a further **\$198,000** to eligible causes in the 2023–24 financial year, bringing total support through CSR activities to more than **\$209,000**.*

Causes supported:

300 Blankets	Lighthouse Foundation
AFL Cape York House Foundation	Neuroendocrine Australia
Blue Ribbon Victoria Police	Property Industry Foundation
Cancer Council Victoria	Salvation Army
Cure Brain Cancer Foundation	St Kilda Gatehouse
Fareshare	St Vincent de Paul Society
Fight MND	The Smith Family
Fred Hollows Foundation	Tour De Cure
Foodbank	Very Special Kids
Giant Steps Melbourne	World Vision



Community *leave*

Community leave is a core part of giving back at the firm. All permanent staff are entitled to one day per year of paid community leave. Throughout this financial year, our people rolled up their sleeves (sometimes literally) to donate their time and help out at different organisations from Fareshare to the Property Industry Foundation.

Port Phillip EcoCentre – *CSR team day*

Our Investment Advisory team took a community leave day together to support the Port Phillip Eco Centre. The team got their hands dirty, helping with planting and gardening activities that support the ecological health and diversity of the area.

The Port Phillip EcoCentre is a not-for-profit, community-managed environment group located in the St Kilda Gardens. For 25 years it has been coordinating environmental sustainability activities and education within the local community.



We spent our CSR day with the Port Phillip EcoCentre. It was a memorable experience, marked by the joy of being out in the sun and contributing to environmental sustainability. We learnt about the native plants in St Kilda East region and their importance to the ecosystem. The hands-on planting activities were both rewarding and fun as we seeded new plant life for the area.

Beyond the environmental impact, the day offered an opportunity to bond with colleagues outside of the work environment, have some fun, and build our team spirit. The weather was also fantastic. The combination of learning, collaboration, and the great outdoors made for a great experience that left everyone looking forward to the next CSR day.



Marco Fantozzi
Senior Investment Analyst – Investment Advisory

Property Industry Foundation – *Toiletries Drive and Wrap Day*

Every year Pitcher Partners sponsors the Property Industry Foundation's Toiletries Drive, donating everyday toiletries for homeless youth. These supplies are then donated to Melbourne City Mission to be distributed to the city's most vulnerable and in need young people. This year we took it a step further, hosting the annual Wrap Day, and our people, alongside community members and supporters came together to box up the donations, and help to get them out to the people who need them most.



I have been really proud to see Pitcher Partners' involvement in this event continue to grow each year. Originally just providing a handful of volunteers, we now sponsor the Toiletries Drive, host the Wrap Day, and assist with the collection of huge quantities of toiletries from clients and staff. It provides a great opportunity to connect with people across the property industry, all while contributing to a very valuable cause.

Ultimately, it's about supporting our community, and getting behind this event helps to have a major impact for those in need. Everyone deserves to be able to maintain basic hygiene practices, and an event like this is key in helping those living transient or sleeping rough reduce the risk of disease, improve self-esteem and social inclusion and overall improve their quality of life.

There are many ways to get involved, and seeing the involvement grow every year shows the impact it has both on the firm and the community.

Matthew Stevens
Senior Manager – Business Advisory and Assurance



Charity profile

Muscular Dystrophy Australia

Support provided: *Pro bono professional services and charity donations*

Muscular Dystrophy Australia (MDA) raises awareness and funds to optimise the lived experience for people with this neuromuscular disease. This is done by delivering client services, programs, education and support, and funding research.

A patient advocate organisation, MDA represent the needs of over 40,000 people living with one of 30 different types of this condition. The support and services provided use evidence-based and patient-informed strategies to optimise the lived experience for those with MD. Financial donations and service-based support, including that provided by the firm, helps to fund research that aims to stem disease progression and support innovative projects that lead to a cure.

Together with their partner organisations, MDA have built a powerful community force, united on a shared goal to significantly reduce the impact of neuromuscular disease in Australia.

Support provided: *Pro bono professional services*



Through a revitalisation of client programs and fundraising initiatives, and via a newly focussed strategy which will drive impact through support, advocacy and research, we are connecting locally, nationally and globally – and are excited to be partnered with organisations such as Pitcher Partners. Our work together supports profound and powerful outcomes for our community.

Catherine Stace
CEO – Muscular Dystrophy Australia



The Pitcher Partners *Charitable Fund*

Studying to kickstart a professional career is a significant financial commitment and this can be prohibitive for some aspiring professionals. That's why we established the Pitcher Partners Charitable Fund in 2014, to fund scholarships for aspiring accountants (and other industry professionals). In partnership with Deakin University, up to three scholarships are made available each year, chosen by a professional panel which includes some of the leaders from our firm.

Funding for the scholarship program is provided through:

- contributions by the Melbourne partnership
- fundraising initiatives supported by the firm, clients and staff

In the 2023–24 financial year, we contributed a total of \$103,000 to the fund and paid out \$75,000 in scholarships to eligible students. It's our way of giving back to the industry, and helping future professionals get the best start. Many of our scholarship recipients go on to our Vacationer and Graduate programs, paving the way for an impactful career.





The *legacy* of our people

From the 2023–24 FY we've renamed our scholarships, in memory of two former employees who had an extraordinary impact on the firm. The Jeaneth Bautista and Warren Galgut scholarships are a way for us to honour the legacy of each of these exceptional people and strive to continue their good work.

The Jeaneth Bautista scholarship

Jeaneth was a highly valued member of the Finance & Operations team in Melbourne. She brought so much to so many with her spirit, great sense of humour and her strength of character to get the job done. Jeaneth's generous nature meant she spent much of her free time helping others – including organising fundraising efforts for the under privileged in her native Philippines.

Those lucky enough to have worked with her will continue to honour her memory in the firm and through this scholarship.

Jessica's story

After finishing her schooling, including Accounting by Distance Education, Jessica Missen chose the Bachelor of Commerce for a variety of reasons. After studying Business Management and Accounting in VCE, she found a strong interest in exploring the professional pathways and these courses gave her great insights into other areas of business that fuelled her desire to study further. The Bachelor of Commerce was a natural choice given its variety of majors as well as the emphasis on work integrated learning.

Jessica was drawn to the professional opportunities that completing a major could offer, in particular the natural progressions for recognised accreditation. Being a driven student, Jessica undertook two majors, Accounting and Financial Planning, setting herself up to explore a variety of career opportunities. In the future, she hopes to use her skills to support businesses to grow and thrive, further cementing the Bachelor of Commerce as an ideal study pathway.

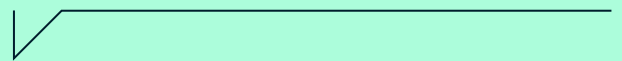
Once she finishes her degree, Jessica is eager to enrol in professional accreditations such as the CA or CPA program. The scholarship has meant she worries less about working to make ends meet, affording her the ability to focus entirely on studies and achieving the highest standard she can.

When not studying, Jessica enjoys spending time with friends and connecting with her community after joining a local women's cricket team. Her commitment to her studies and drive to do good will see her build an impactful career in the industry.



The PPCC scholarship inspires me to challenge myself academically and reinforces my strong passion for accounting, to keep learning, furthering my education, and building and developing new skills.

Jeaneth and this scholarship inspire me to be the best person I can be. I'm grateful for the opportunities this scholarship affords me, and it will always serve as a push for me to take on new opportunities, to do my absolute best at university and in my future career.



Jessica Missen
Pitcher Partners Jeaneth Bautista Scholarship Recipient

The Warren Galgut scholarship

Warren was an instrumental member of the Corporate Finance team, specialising in M&A advisory and financial due diligence. Warren was respected by his clients and peers alike, for his technical acumen and strong work ethic. He was a patient mentor to junior staff and well connected to all divisions within the firm.

After being diagnosed with motor neurone disease (MND), Warren spear-headed numerous initiatives to raise money for Fight MND. In typical Warren style, he greeted the challenge head on with humour, courage and an admirable honesty. Warren is missed by all who knew him and his memory is honoured through his scholarship.

Indie's story

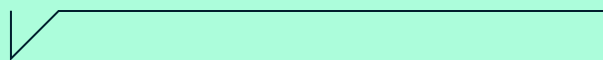
Hailing from the rural town of Ararat, Indie Calvert discovered an interest in all things accounting in her last years of high school. It was thanks to the support of a particularly inspiring teacher that she decided to explore pursuing a career in the finance world. Indie has always been fascinated by the financial side of business, and after a visit to Deakin's Waurin Ponds campus, she knew it was the place for the next phase of her studies.

As a self-professed analytical thinker, Indie is particularly interested in financial accounting, but is excited to explore the other potential career pathways throughout her studies. For her, the scholarship has been instrumental in being able to focus solely on studies and maximise her academic performance without the stress of balancing work and demanding personal circumstances. Throughout 2023, she was navigating medical priorities, which meant stepping away from studies to work to afford necessary medical costs. With the support of Pitcher Partners and this scholarship, she can fully focus on her studies and work towards a rewarding career in professional services. Following her studies, Indie hopes to partake in a graduate program, looking forward to the hands-on experience it can offer.

Outside of her studies, Indie enjoys reading, music, and creating art. Looking to graduate in the next year, Indie has a bright future ahead of her.



Being awarded this scholarship is legitimately life-changing. During my studies, needing to afford things to manage my health meant I could never fully focus on my studies and had to prioritise paid work. This scholarship gives me the support that means I can worry less about finances, and instead focus on working towards my professional career goals.



Indie Calvert
Pitcher Partners Warren Galgut Scholarship Recipient

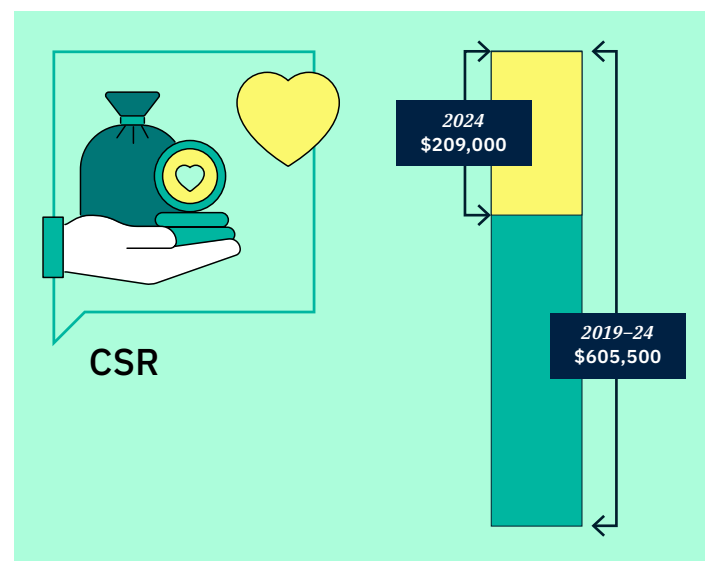
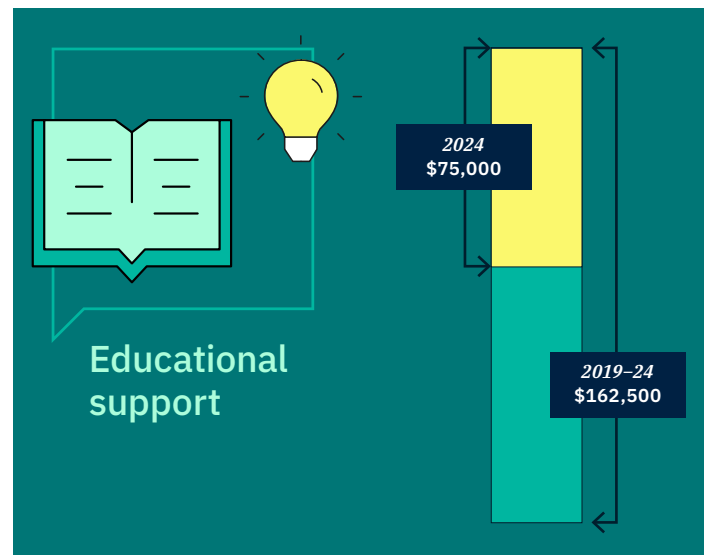
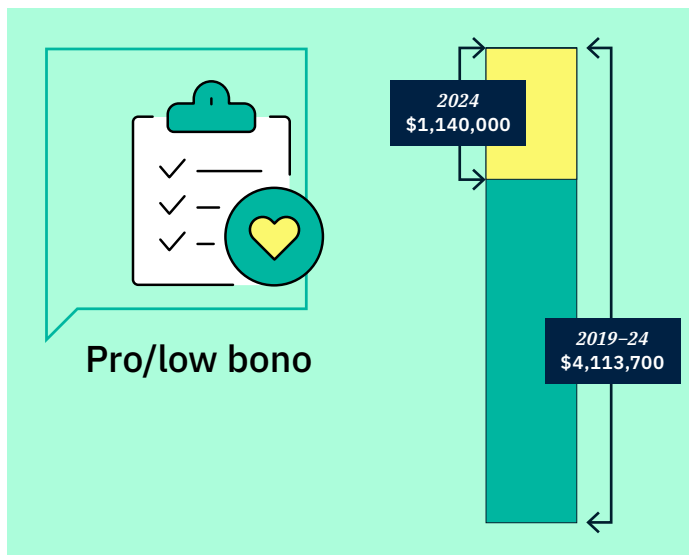


Impact *summary*

We've achieved a lot this year, and over the last few, and we couldn't do it without the help of our people.

Support summary

Initiatives	2023–24	Support	2019–24
CSR (including direct contributions)	\$209,000	Check out our summary on page 7	\$605,500
Pro/low bono	\$1,140,000	75+ organisations supported	\$4,113,700
Educational support	\$75,000	See Jessica and Indie's stories on pages 12 and 13	\$162,500
Community leave	\$97,000	130+ staff provided more than 465 hours of volunteer work to a range of causes	\$478,800
Total	\$1,521,000		\$5,360,500



Governance

While Pitcher Partners' Charitable Committee is not a registered charity or not-for-profit, it operates using the same governing principles. This helps to ensure it acts fairly and in accordance with both best practice and legal and regulatory requirements.

Purpose

The Committee acts as a driving force to support our people in making an impact.

The role of the PPCC is to ensure all contributions are made within agreed operating principles and guidelines. The Committee oversees the full scope of our charitable contributions.

Accountability and responsibility

The Committee is made up of skilled and experienced individuals, all dedicated to steering the Committee to deliver on its purpose and obligations. Committee members are drawn from the Melbourne partnership and the firm's executive team, including representatives from Finance and Client Experience, as well as the firm's CSR Committee.

Compliance

While the Committee is not a registered charity or not-for-profit, it reports on its initiatives annually and ensures Pitcher Partners' volunteers and representatives adhere to relevant workplace requirements where necessary, including Work Health & Safety and Working with Children checks.

Duties

Members meet quarterly to discuss the activities of the Committee and how they are tracking against goals. They share the outcomes of their initiatives every year in the Charitable Committee annual report.





Meet the teams *driving change*

Pitcher Partners Melbourne's charitable initiatives are driven by dedicated people within the firm and the community.

In particular, we recognise the commitment of both the Charitable Committee and the Corporate Social Responsibility Committee for their collective efforts in supporting the community.

Pitcher Partners Charitable Committee

The Committee is driven by experienced business professionals, drawn from the Melbourne firm's partnership and senior management teams. The members comprise:



Mark Harrison

Chair

Partner – Business Advisory and Assurance



Brendan Britten

Member

Managing Partner



Sue Dahn

Member

Consultant – Investment Advisory



Kristian Lawson

Advisor

General Manager – PMG



Kellie Davidson

Member

Partner – Investment Advisory



Aileen O'Carroll

Member

Partner – Tax Advisory



Steven Marcato

Advisor

Director – Finance and Operations



Toni Wilson

Advisor

Director – Brand and Communications

Corporate Social Responsibility Committee

The Committee is driven by leaders from all areas of the Melbourne firm. The members comprise:



Mark Harrison

Chair

Partner – Business Advisory and Assurance



Ashley Piper

Member

Manager – Tax Advisory



Rebecca Koch

Member

Senior Analyst – Business Advisory and Assurance



Eliza Osborn

Member

Analyst – Business Advisory and Assurance



Sarah Whelan

Member

National Communications Senior Advisor



Bela Attewell

Member

Events and Sponsorship Advisor



Viral Mehta

Member

Analyst – Tax Advisory



Emily Stallen

Member

National Communications Advisor

Making business *personal*

We're ready to help you thrive

Since day one we've been helping businesses, families and individuals intelligently frame their goals and make the most of their potential.

Today, we're one of the largest accounting, audit and business advisory firms in Australia. We work with middle market businesses, from family-run companies to renowned industry leaders and iconic brands. And help families and individuals manage their wealth across generations.

If you've got ambition, we're the team you want on your side.

Local knowledge, national footprint

Pitcher Partners is a national association of six independent accounting, audit and business advisory practices.

You'll find our firms in Adelaide, Brisbane, Melbourne, Newcastle and Hunter, Perth and Sydney. Each firm has a unique character, with a strong connection to the local community. Supported by our combined resources, we deliver Australia's most personalised and responsive assurance and advisory services.

And if you're thinking beyond the border, we can support your global operations and ambitions through the Baker Tilly International network.

We'll always make it personal

At the heart of Pitcher Partners is the idea that business is never just business. We're known for the dedication we give to building great relationships, and it's been that way from the start. People first.

Everything we do is grounded in communication and collaboration. We're here for that frank, refreshing and always informed discussion that leads to new ideas and better decisions. And we're here for you. Whatever your goals, we can get there together.

Pitcher Partners. Making business *personal*.