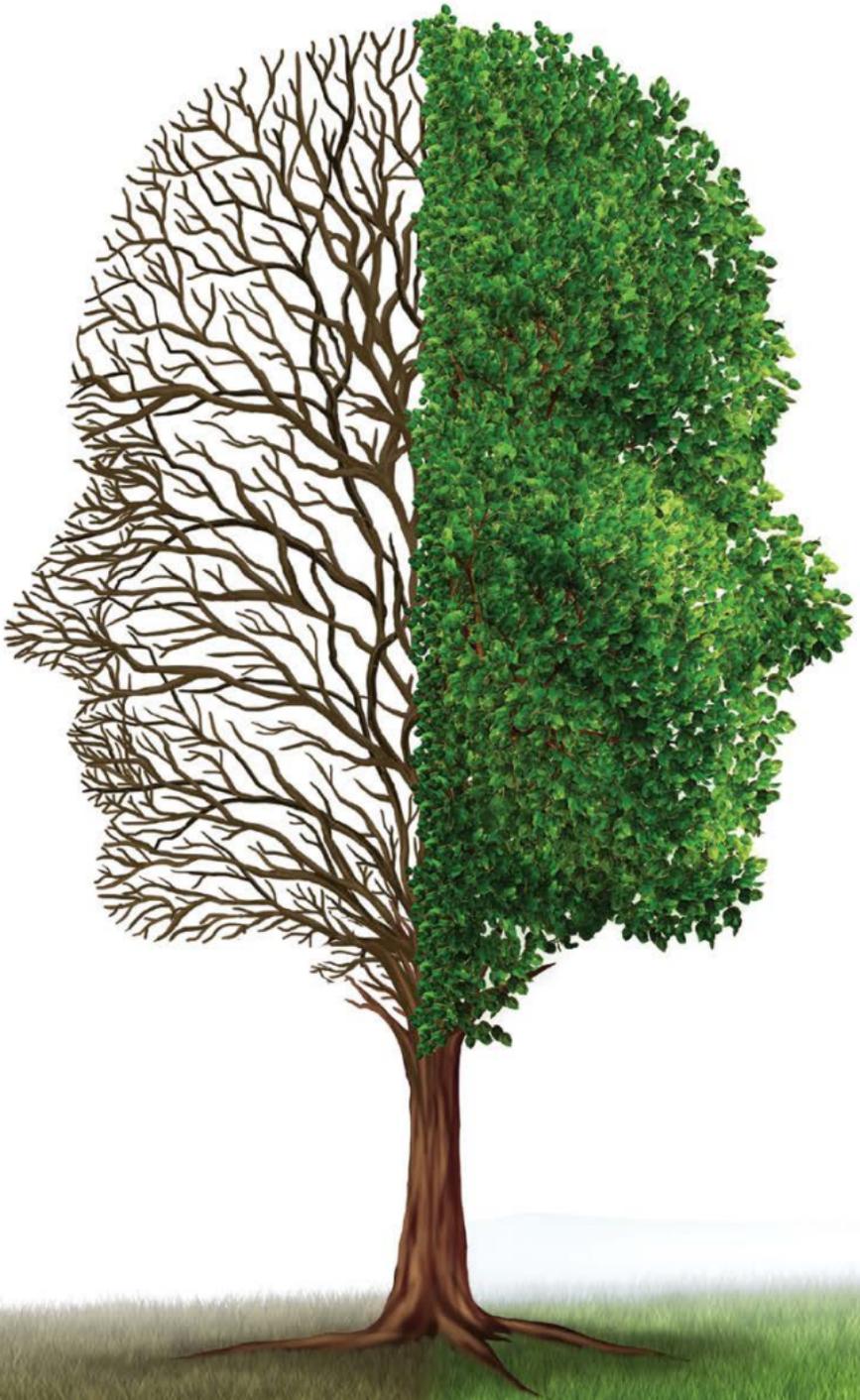




**Pinnacle**  
CHARITABLE FOUNDATION



Investing in the Community...

**Helping to build a compassionate,  
creative and clever Australia**

## Introduction

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The Pinnacle Charitable Foundation (Foundation) has a longstanding mission to facilitate positive social change, and help build its vision of an engaged and vibrant Australia. To achieve this, the Foundation and its forerunners have for 30 years maintained a continuous commitment to actively champion great Australian not-for-profit (NFP) organisations.

Clever and creative thinkers who are seeking answers to some of the country's most pressing problems, have been encouraged to develop evidence based products, programs and services. In each case the Foundation's goal has been to help them deliver solutions which can be analysed, assessed, strengthened and scaled across communities.

As an early stage backer, which frequently offers seed funding to encourage trials and to incubate new projects, the Foundation has often seen its initial investment become a crucial stepping stone. Through securing further funding from private and public donors, many entrepreneurial organisations have successfully developed their long term capacity to drive change across their communities.

**With extensive insight into Australia's NFP sector, the Foundation offers donors a dedicated, effective and responsible way to implement their personal giving. All donations over \$2.00 are fully tax deductible, and 100% of every dollar donated is allocated by the Foundation to its NFP partners.**

### Fighting Chance

*"Pinnacle Charitable Foundation recognises the importance of early backing for start-ups in the not-for-profit space, providing timely reinforcement for fledgling outfits and their founders' vision. The Foundation has been a valued partner of Fighting Chance from our early days, and remains committed to our agenda of innovation, and to our vision of creating new models of inclusive work for people with disability."*



Photo (above): Jigsaw - a Fighting Chance social enterprise

## A History of Community Investment

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The Foundation is proud to have built meaningful relationships with more than 60 Australian charities. Donations exceeding \$3.4 million, coupled with pro bono assistance, have aimed to foster innovation and enable growth.

Prior to any new funding being committed, extensive due diligence is formally undertaken. This ensures recipients share the Foundation's focus on strong internal governance and rigorous external research, together with the passion to deliver impact.

Adopted causes are determined in collaboration with the strategic objectives of Pinnacle Investment Management Group Limited (PNI) and its affiliated fund managers. Affiliates, together with the Foundation, engage with entities which reflect their adherence to broad ESG (environmental, social and governance) principles, by giving their own contributions of funds, time and advice. This increases the size of donations and ensures multiple connections are in place.

The Foundation is registered with the ACNC (Australian Charities and Not-for-profits Commission). It is endorsed by the ATO as a Deductible Gift Recipient (DGR) public ancillary fund covered by Item 2 of the table in section 30-15 of the *Income Tax Assessment Act 1997*.

Please direct any queries about the Foundation's structure and its approach to developing partnerships to the following: [foundation@pinnacleinvestment.com](mailto:foundation@pinnacleinvestment.com)

### HeartKids Limited

*"As Founder of HeartKids' Grants-in-Aid Research Awards Program, Pinnacle Charitable Foundation has been pivotal in the establishment and subsequent growth of our unique research funding program. This program specifically aims to provide seed funding for short term research projects and pilot studies, enabling the generation of initial data to leverage and secure much larger research grants."*



Photo (above): Huxton with his heartbeads

## Streamlined Operations with Solid Support

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PNI has a strong belief in corporate Australia's responsibility to give back to the communities which sustain and inspire businesses both large and small.

With the financial backing of PNI and access to pro bono services across investment management, portfolio reporting, finance and IT, the Foundation operates in an efficient manner with low overheads and high impact.

Robust operational processes and policies, underpinned by strong leadership and an experienced Board of Directors including PNI nominated representatives, ensure that governance is of the highest standard and all decisions are transparent, independent and ethical.

The Foundation's investment strategy aims to provide reasonable capital protection whilst driving growth over the longer term. Investments are held in a range of suitable products offered across Pinnacle's Affiliates, with fund managers committed to rebating management fees.

Relationships across the NFP sector are based on mutual trust, respect, open communication, shared goals and a willingness to take measured risks to achieve defined outcomes.

Engagement is based on a documented approach and shared goals, which help to facilitate long term, mutually beneficial partnerships which are flexible, effective and rewarding.

### batyr Australia

*"It is refreshing to work closely with an organisation which is passionate about making change, and which like batyr understands the need for long term commitment to create true impact."*



Photo (right): batyr@schools

## Charitable Focus in the Year Ahead

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Suicide is currently the leading cause of death for Australians aged between 15 and 44\*. At the Foundation we're doing our bit to try and change this statistic.

The Foundation is partnering with three inspiring organisations – R U OK?, batyr Australia and ReachOut Australia – which are addressing mental health issues at the outset and aiming to prevent them from escalating, including in drought-affected regions.

R U OK? empowers and inspires the broader community to take responsibility for helping those who are struggling, while ReachOut delivers online and digital mental health services and practical, relevant solutions for young people and parents. batyr tackles the stigma associated with mental ill health, and works in schools and universities to encourage and ensure young people can safely and openly share their stories. **Their collective impact in acknowledging and minimising early stage mental health issues through actively working on the frontline of prevention and early intervention, is essential for the future health of communities across the country.**

In addition to the critically important work being undertaken in this field, the Foundation has also recently focused on five additional core themes:

- > Providing specialised and trauma informed legal support to people experiencing domestic violence and sexual assault, and accordingly better access to court justice (Full Stop Foundation)
- > Connecting aspiring business owners with microenterprise support at an individual and community leadership level (Many Rivers Microfinance)
- > Funding cutting edge medical research aimed at finding treatments and cures for children's genetic diseases (Children's Medical Research Institute – CMRI)
- > Creating thriving communities through best practice mentoring programs that empower young people to become resilient, capable and connected (Raise Foundation)
- > Empowering Indigenous children from regional, rural and remote communities to bring about generational change through providing trusted, quality educational opportunities (Yalari)

\*Beyond Blue (2018)

# Making a Difference

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Historically many additional causes have resonated with employees, clients, stakeholders and the funds management industry. Multi-year partnerships have covered a wide range of endeavours, including the following:

- > Pilot development of a Congenital Heart Disease Registry – HeartKids
- > Employment for those with disabilities – Fighting Chance
- > Educational scholarships for indigenous young children – Yalari
- > Excess food collection and distribution – OzHarvest
- > Communication aids for the terminally ill – MND and Me Foundation
- > Youth led peer to peer engagement programs – The Reach Foundation
- > Child abuse education and prevention – Child Wise
- > Protection of native animals and land conservation – FRRR (Foundation for Rural & Regional Renewal)
- > Captive breeding programs for endangered species – Taronga Foundation

The Foundation has been proud to help initiate programs and form partnerships with these and many other professional and committed organisations, led by dedicated and passionate individuals. **We warmly invite you to share in our future efforts to acknowledge and applaud their vital contributions towards building a compassionate, creative and clever Australia. Please visit the Pinnacle website for more information and case studies: [www.pinnacleinvestment.com/foundation](http://www.pinnacleinvestment.com/foundation)**

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## Goongerah Environment Centre (GECO)

*“The funding for our project by the Pinnacle Charitable Foundation and the Foundation for Rural & Regional Renewal (FRRR), was the first major grant we had received. The experience of applying for and managing this donation was a very positive and valuable one... we now have the confidence to approach other funders to support our efforts.”*

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