

Freemasons
Foundation Victoria

ANNUAL REPORT

2018 -2019

OUR VISION

To contribute to a stronger and healthier Victoria through thoughtful and purposeful charitable support and community involvement.

OUR MISSION

To invest in programs and initiatives that are expected to provide stronger and healthier communities and by supporting individuals through access to education.

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A WORD FROM THE GRAND MASTER

Charity is at the core of Freemasonry; in that our members are encouraged to understand their moral obligation to be generous in their giving to those in the world who are less fortunate than themselves. This is achieved often through simple acts of kindness on a daily basis, but also through practical giving, in support of groups and causes who need financial help.

For over 160 years the Freemasons of Victoria have given generously and in the last few years we have made great strides in making our contribution to Victorian Society, even more substantial, through the amazing work of our lodges, supported by Freemasons Foundation Victoria Limited. This work could not be possible, without the remarkable efforts of the Directors and Committee Members of the Foundation, who give their time and professional experience to work as a team, to ensure the Foundation is in a very strong position to support these efforts. I therefore take this opportunity to thank them for all of their efforts in achieving remarkable outcomes over the last twelve months.

The Brethren have found many ways to support the communities in which they live. Indeed over the last 12 months, hundreds of large and small donations have been made, across the entire state. Scholarships totalling over \$350,000 to students at secondary and in our Universities, reflects the importance we place on education, in developing the next generation to achieve their goals. From giving a much needed injection of financial aid to Support After Suicide in Geelong, to providing desperately needed support by giving 12 trucks loaded with stockfeed for drought impacted

farmers in Gippsland and helping create a new Hospital facility in Swan Hill, the initiatives are a testament to the generosity of spirit which is a feature of all Freemasons.

In total for 2018-2019 over \$3.1m was distributed to the Victorian Community by the Foundation and as we approach 5 years since the Foundation was established, so the fantastic amount of \$10m will have been given to deserving causes.

We are all the beneficiaries of the building blocks put in place by previous generations of members to create the strong financial legacy that created the Foundation. This Foundation is now on a path to become an even more generous benefactor to the people who need our help, across the length and breadth of Victoria.

In June 2018, George Sutherland and Dr John Maynard retired as members of the Foundation due to their terms of office coming to an end. Thank you for your dedication and service to the Foundation.

As Grand Master of Freemasons Victoria I salute all the members of our fraternity, in giving as generously and by their daily approach to practising universal charity and living up to **our vision of making the world a better place.**

Most Worshipful Brother Keith Murray
Grand Master
Freemasons Victoria



CHAIRMAN'S REPORT

In November 2018 I was appointed Chairman of Freemasons Foundation Victoria and I thank the members of the Company for appointing me to this role. I also thank and congratulate my predecessor, Andre Clayton for his tireless work throughout his term as Chairman.

A number of Directors have left the Foundation due to their respective term in office coming to an end. To Andrew Dexter, Ted Finch, Jane Hill, Dr George Streitberg and Carol Scholes-Robertson thank you for your dedication, commitment and professionalism. Your contributions were significant.

The Foundation has also welcomed Garry James, Rodney Lavin and John Patterson as Directors to the Board.

A review of the Foundation structure was undertaken, and opportunities identified to raise our level of governance and accountability with the view to long term sustainability and to identify opportunities to further grow our corpus. One outcome of that review was to increase the responsibility and levels of accountability in decision making that rests with the Executive Officer. It was also the view of the Board that a more contemporary approach to our business was essential to increase our service delivery capability. As a result of those discussions the sub-committees were discontinued. To everyone who was involved with the various sub-committees you have my heartfelt thanks.

You all gave freely and very generously of your time. Your professionalism, wise counsel and commitment is a testament to your character and reflects the true philosophy of Freemasonry. You should feel rightly proud of your achievements.

During the 2018-2019 year, the Foundation distributed \$2.7m to not-for-profit organisations and \$432k to assist students to reach their potential, taking the total amount distributed since November 2014 to \$10m.

Notable highlights during the year include the one-off Freemasons Community Grant Program where \$821k was distributed to not-for-profit organisations and the announcement of \$500k philanthropic gift over 3 years to Entertainment Assist.

In April the Foundation held a scholarship presentation for Tertiary recipients where over 150 people attended. Since 2015, the Foundation has distributed \$1.5m to students as part of its annual Scholarships and Awards program.

In June, the Board approved our Strategic Plan for the next 3 years. The plan outlines our objectives to continue supporting the Victorian community with our granting as well as to grow the corpus. An overview of the plan is included in this report whilst a copy of the document is available on our website.



The earnings from our corpus enable us to continue our granting into the community and to conduct our business. With the support of our investment advisor and donors we can make a real difference to many live across Victoria.

Finally, I thank Neil Cripps in his role as Executive Officer and Jacintha Chiang for the administration of our business. The fortunate position the Foundation finds itself in today is no mean feat and you both played a significant role in achieving those outcomes and in assisting and supporting the community of Victoria.

Myles King OAM KSJ
Chairman
Freemasons Foundation Victoria

ORGANISATION STRUCTURE

Members

Keith Murray - GM

Richard Elkington - DGM

Don Reynolds - IPGM

Directors

Myles King OAM KSJ - Chairman

Philip Mayers - Deputy Chairman

Timothy Clark

David Gibbs

Garry James - Appointed November 2018

Rodney Lavin - Appointed November 2018

John Patterson - Appointed November 2018

Staff

Neil Cripps - Executive Officer

Jacintha Chiang - Marketing Coordinator

BECOME INVOLVED

One of the most important aspects of Freemasonry is charity which is a tenet we learn at the beginning of our Masonic career. As the charitable arm of Victorian Freemasonry the Foundation is the philanthropic face of all brethren within our local communities. It goes without saying that we can only carry out the tremendous work we do within the community with the assistance of Victorian Lodges and the generous giving of our Brethren.



Make a donation

Your help can assist the Foundation to continue supporting the Victorian community. Freemasons Foundation Victoria is the Trustee for The Freemasons Public Charitable Foundation, which is a Deductible Gift Recipient charity as defined by the Australian Tax Office. Donations of \$2 or more are tax deductible.



Give in your Will

If you appreciate the values and work of Freemasons Foundation Victoria, a simple way to help us continue our work within the community is by making a bequest as part of your Will. A bequest may take the form of the whole or any portion of your estate or a specific sum of money. You may wish to discuss the matter of a bequest with your family or seek advice from your solicitor if desired.



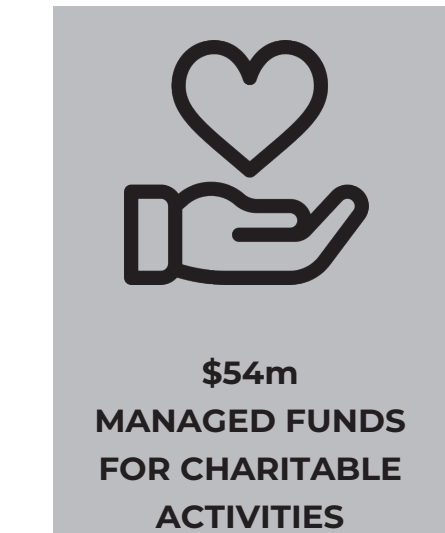
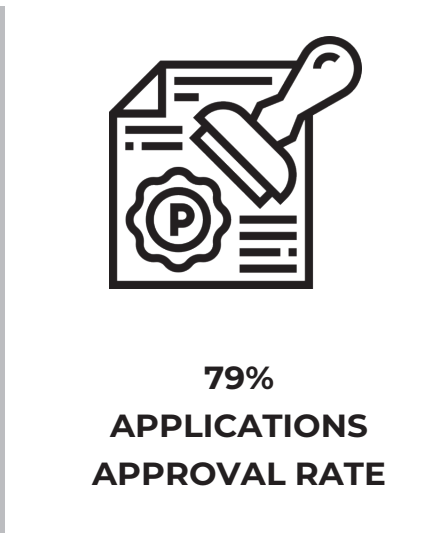
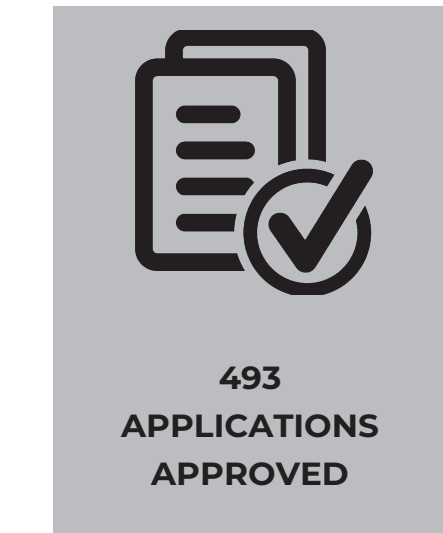
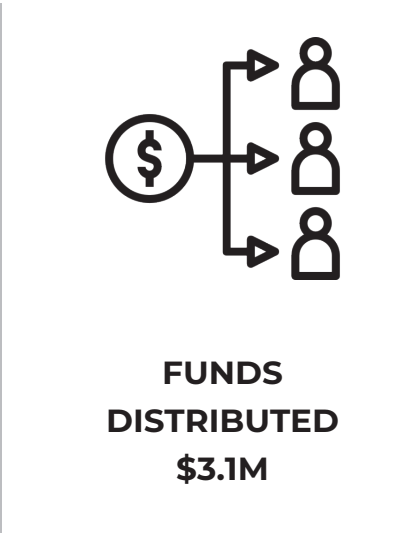
Named sub-funds

Preserve your donation and provide for a long-term gift to your chosen charity in years to come through the creation of a named sub-fund within our charity structures.

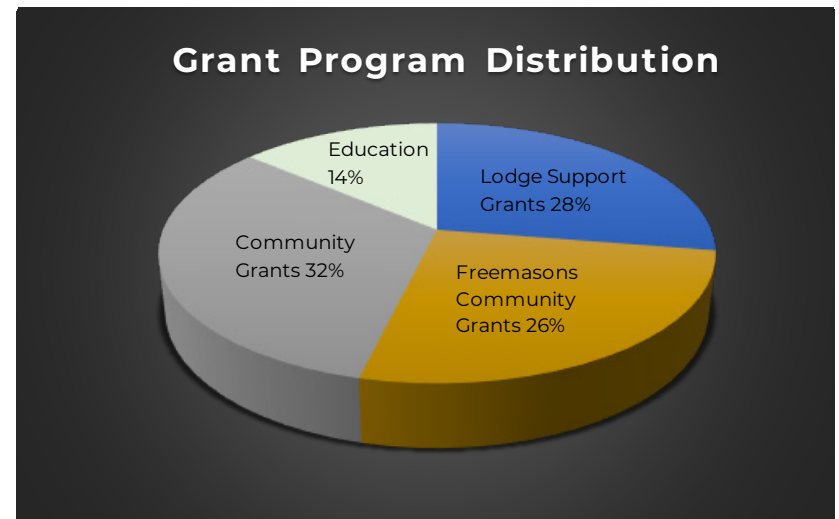
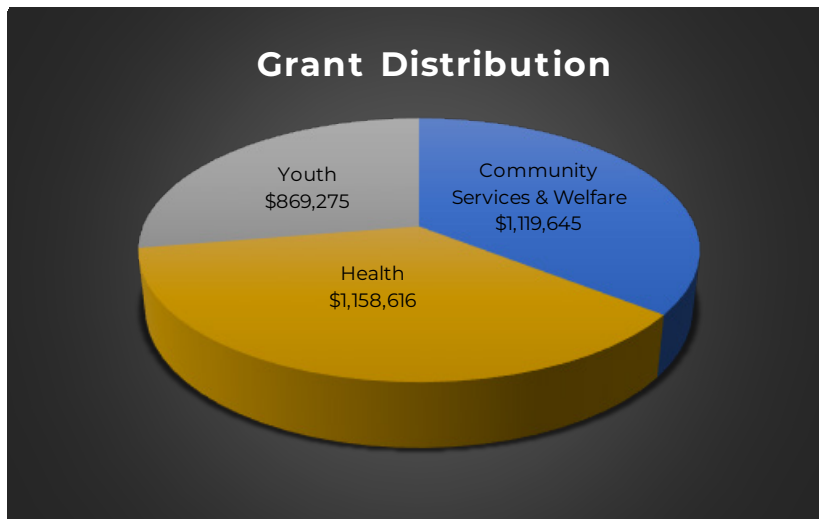
THANK YOU

Freemasons Foundation Victoria say **thank you** to all of the individuals and Lodges who have contributed financial support during the year and to Freemasons Victoria for ongoing support.

HIGHLIGHTS OF THE YEAR



HOW DISTRIBUTED FUNDS CONTRIBUTED TO A BETTER VICTORIA



OUR STRATEGY 2019 -2022

Our 2019-2022 Strategic Plan reaffirms our mission and core values while offering an evolved, overarching goal to help guide our decision making going forward.

Through the execution of our Strategic Plan, Freemasons Foundation Victoria will continue the objectives of granting into the community whilst sustaining and growing the Foundation's corpus into the future.

Our objectives and strategies do not stand alone but are designed to reinforce and strengthen each other across our mission priorities creating a more targeted impact in our philanthropic giving.

Granting into the Community



Since our establishment in November 2014, the Foundation has provided significant grants to major community projects, particularly within the health sector. Some of those projects include Monash Children's Hospital, Mercy Health Werribee, Northern Health, Australian Prostate Centre and Think Pink Foundation all of which continue making substantial impact into the health and wellbeing of the community.

As a maturing organisation, it is appropriate for the Foundation to undertake a review of current practices and adopt a more sophisticated approach in its granting.

Education Support



Since 1912, Freemasons have been awarding Victorian Masonic Scholarships. As part of our ongoing support to the youth of Victoria we will be reviewing our scholarship and awards program with the aim of providing more opportunities for underprivileged/disadvantaged students to be supported and develop relationships with educational institutions to support the Foundation Scholarship Programs.

Corpus Growth



The Foundation Board is charged with governance over a corpus exceeding \$50m. Preservation and growth of the corpus is challenging but essential to the continuance of our philanthropic activities. These growth strategies include:

- ▶ Policy Development – robust governance model to protect and grow Corpus
- ▶ Funding Allocations – cap granting to 4% of net assets
- ▶ Bequest Program – develop and implement a bequest program
- ▶ Named Sub-Funds – launch named sub-funds

Resourcing the Foundation



The Foundation office will relocate to new premises 2019/2020. This will afford opportunity to review current workplace policies and practices, staffing requirements into the future, the Foundation governance model and overall legislative compliance.

OUR METHOD OF SUPPORT

1. Granting into the Community

Lodge Support Granting

This is the cornerstone of our philanthropic giving. Whenever possible Victorian Craft Lodges will be supported in their local community charitable works with not-for-profit organisations of a charitable purpose in the areas of Education, Health/Medical Research, Community Development, Youth Development Programs and Indigenous Programs.

Community Grants

Available to not-for-profit organisations to apply directly to the Foundation to support a specific project or part of a project for programs and initiatives in the areas of Health/Medical Research, Community Development, Education and the Arts. Grants may be for one to four year durations up to \$50,000 pa.

Major Impact Grants

Designed to support/contribute to substantial projects in Victoria. One-off grant over a specified number of years. The grant range is between \$250,000 - \$500,000 in the areas of Health/Medical Research, Education, Community Support and Indigenous Programs.

Financial Assistance

The provision of financial relief to current members of Freemasons Victoria and their dependants or former registered members of Freemasons Victoria and their dependants who are in financial need or require other support which cannot be provided by Government or other agencies.

2. Education Support

Masonic Education

Supporting Victorian Craft Lodges with their local community scholarships, bursaries and awards for primary and secondary students.

Scholarships and Awards Program

Available annually to secondary students and 1st year tertiary students taking into consideration the students result, financial need or difficulties, school and community activities.

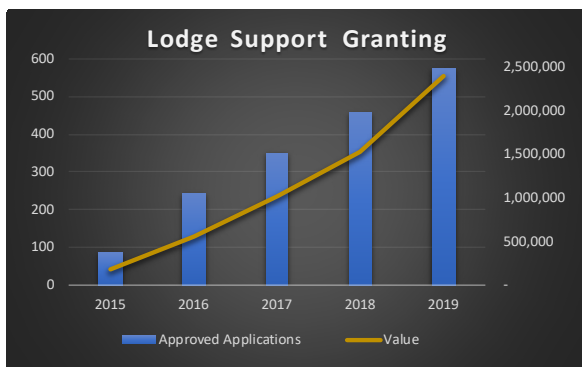
Bursaries

Assist tertiary students requiring financial support to complete their studies.

LODGE SUPPORT GRANTING

During the year Freemasons Foundation Victoria supported many Lodges, Districts and Masonic organisations with their charitable works within the community.

Freemasons Foundation Victoria matches funds raised and in some cases, provides additional funding to support local community projects. This year, 116 applications were approved and over \$860,000 was distributed under our Lodge Support Granting program.



Freemasons Supporting the Local Community

- ▶ Victorian Freemasons raised \$150,000 for Northern Health and Taralye at their Gold & Black Ball fundraising event in November 2018. With an additional \$150,000 from the Foundation, Northern Health purchased equipment for their new paediatric high dependency unit whilst Taralye erected shade sails in their playground.

- ▶ Wimmera Cancer Centre in Horsham received \$150,000 to fit out an Oncology & Chemotherapy Room and Consulting Room after receiving applications from Wimmera Lodge.
- ▶ Freemasons from Monash Gully District provided \$45,000 ongoing support to Interchange Outer East Sibling Program. The funding allows the program to continue the support of siblings of disabled children by providing after school activities and camps.
- ▶ Community Support Frankston received a grant of \$3,000 after an application from Lodge of Honour.
- ▶ Lodge of Australia Felix, presented \$1,000 to Eastern Emergency Relief enabling the purchase of food and bedding for their emergency relief programs.
- ▶ Lodge of Rapport presented \$1,000 to Waverley Benevolent Society to provide Christmas hampers to families and individuals in need.
- ▶ Diamond Valley Foodshare received \$2,500 from The Revival Lodge in Greensborough to assist with the provision of food hampers in the local community.
- ▶ Hope Bereavement Services received \$4,000 from Geelong Lodge of Unity and Prudence to assist with their counselling services of grieving parents who have lost their children to sudden death.

- ▶ Freemasons from SEAVIC Lodge, Lodge of the Golden Fleece and Lodge Evolution combined to donate \$30,000 to St Mark's Community Centre in Fitzroy. The centre provides a range of support to people in need.



- ▶ Lodge Fraternal donated \$6,000 to Impact for Women to assist women and children fleeing violence in the home.
- ▶ Bayside Freemasons combined to raise \$19,500 to provide Christmas food hampers for families in need in the local area.
- ▶ Freemasons Foundation Victoria and Cobram Lodge combined to grant \$57,500 in support of the construction of Cobram Community Cinema for use by the local community.
- ▶ Surf Lifesaving Lakes Entrance received \$3,621 from Gippsland Lakes Lodge to purchase sun shelters.

- ▶ Lodge Fraternal donated \$3,000 to Chevra Hatzolah Melbourne enabling them to purchase a defibrillator.
- ▶ Tallangatta Health Service received \$15,825 from Benambra Lodge allowing them to purchase a Semi-Automatic External Defibrillator for their Urgent Care Room.
- ▶ Ballarat Health Services received \$10,000 from Sturt-Buninyong United Lodge to purchase an iStat Machine for the Maternity Unit. The equipment enables a baby's blood sample to be taken and analysed on the ward and provide a time critical result.
- ▶ Girl Guides in Bacchus Marsh received \$2,400 to purchase camping equipment resulting from a matching fund application from the Duke of Abercorn Lodge.
- ▶ Freemasons from Elrona Lodge and Lodge Killara in Greensborough combined to support Kalparrin Early Childhood Prevention Program with a grant of \$11,000 to purchase furniture for use of primary school children using their service.
- ▶ St Mary's College for the Deaf in Wantirna received \$10,980 from The Spring Vale Lodge toward the purchase Soundfield Equipment to support students with hearing difficulties.

- ▶ The Foundation joined with Monash Lodge donating \$10,000 to Very Special Kids.



- ▶ The Foundation supported Lodge of Australia Felix in providing \$1,500 to Cleff Palate and Lip Society to purchase feeding equipment.
- ▶ Hepburn Health Service received \$7,000 from All Nations Lodge in Clunes to assist with their emergency relief program.
- ▶ Freemasons from Lodge of the Great Ocean Road continue to support the local community by donating \$1,500 to support Anglesea and Aireys Inlet Foodlink and Torquay Food Aid.
- ▶ Koo Wee Rup Masonic Lodge contributed \$1,000 to Koo Wee Rup Secondary School to assist with the purchase of text books.
- ▶ Morwell SES received \$2,900 from Traralgon Lodge allowing the purchase of a Defibrillator.

- ▶ Portland Lodge provided ongoing support to students attending Heywood and District Secondary College and Portland Secondary College with \$25,600 to assist students with various programs.
- ▶ Bendigo Chinese Association Museum received \$5,000 from Golden and Corinthian Lodge supporting the purchase of a new dragon.



- ▶ Lodge Belvoir provided \$1,000 to 1st Baranduda Scout Group towards the purchase of a trailer.
- ▶ Austin Health received \$4,225 from Baxter Lodge to purchase furniture for the Psychological Trauma Recovery Unit.
- ▶ Swan Hill Lodge donated \$8,000 to Swan Hill District Health to support local health initiatives.
- ▶ Mallee Family Care received \$1,500 from Mildura Lodge to assist local families in need.

ALFRED HOSPITAL

Freemasons from Lodge Fraternal with support of Freemasons Foundation Victoria donated \$50,000 to The Alfred's Father's Day Appeal enabling the hospital to purchase 10 Vital Sign Monitors.

The equipment has enabled better care for patients at the bedside with the impact already being experienced. Amy McKimm, Executive Director of Information Development, shared examples of the impact that Freemasons have helped achieve:

- ▶ With easy access to our patient's record wherever they are, we have seen a significant drop in the time taken "looking for a patient's record" (which could have been up to 45 minutes a shift for a nurse).
- ▶ Following implementation, we have had a few instances where there has been a national drug shortage. The system allowed us to immediately find all patients on the drug and swap them to another appropriate medication. Previously this would have involved reviewing individual drug charts, and with over 800 patients in our care this was extremely time consuming.
- ▶ With the computer at the patient's bedside, every consultation becomes a teachable moment, supporting medical staff to inform patients by talking through their results and showing them x-rays.



Vital Sign Monitor purchased by Alfred Hospital.



Cheque presentation to Alfred Hospital at their annual Father's Day Appeal breakfast.

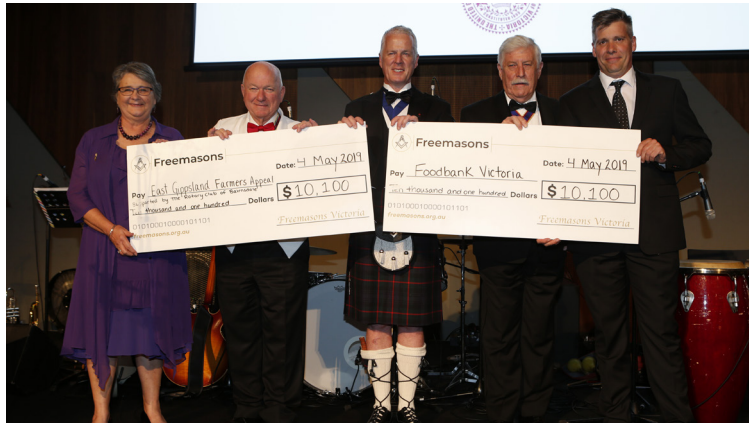
FREEMASONS SUPPORTING THE LOCAL COMMUNITY

Victorian Freemasons and Freemasons Foundation Victoria combined to donate \$176,000 during the year to support organisations assisting families in time of need.

Let's Talk Foundation in Warrnambool received a donation of \$41,000 raised as part of Freemasons Victoria Grand Masters Appeal after the March 2018 bushfires in South West Victoria plus an additional \$13,000 from the Foundation to employ a Community Education Officer to develop, facilitate and deliver health programs to people impacted by the bushfires.

At the United Grand Installations Banquet in May, the Foundation contributed \$15,000 towards donations of \$10,100 to the Rotary Club of Bairnsdale Farmers Relief Program and Foodbank Victoria.

The funds donated to the Farmer Relief Program has allowed the Rotary Club of Barinsdale to continue their support of East Gippsland families affected by the drought by supplying much needed stock feed, food supplements and shopping vouchers.



Applications submitted by Freemasons from Gippsland East District led to the approval of two grants totalling \$100,000 to support local farmers affected by the Gippsland drought.



- ▶ A \$50,000 grant to Gippsland Farmer Relief in Traralgon for the provision of \$50 food vouchers, \$200 Eftpos Cards and \$100 fuel vouchers as well as the purchase of supplies for food aid hampers.



- ▶ A \$50,000 grant to Lions Need for Feed Disaster Relief.

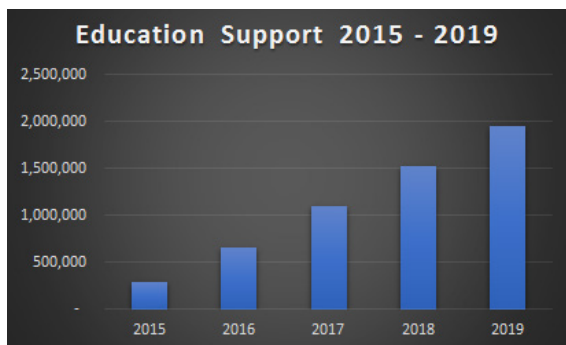
A request from the Burgundy Ladies Association also saw a further \$2,000 donated to Gippsland Farmer Relief in Traralgon for the purchase of supplies for food aid hampers.

SUPPORTING EDUCATION

Since November 2014, the Foundation has contributed nearly \$2.0m to assist the youth of Victoria to achieve their education goals by:

- ▶ Our annual Scholarship and Awards Program;
- ▶ Supporting Lodges with their local community scholarships, bursaries and awards;
- ▶ Bursaries to assist tertiary students requiring financial assistance; and
- ▶ Tertiary scholarships.

The Foundation remains committed to supporting individuals in reaching their potential and continues to review our education support programs to assist secondary and tertiary students.



Scholarships and Awards

The scholarships and awards are for students in secondary education and first year tertiary education.

The secondary school awards for years 7 to 10 are for one year, whilst year 11 awards are available for 2 years subject to satisfactory completion of year 11. In addition, there are year 12 awards available for one year.

The first year tertiary education awards available to students include:

- ▶ Freemasons Foundation Victoria Scholarship which is tenable for the duration of the undergraduate degree and is valued at \$10,000 per year;
- ▶ Sydney George Manfield Residential Scholarship which is tenable for 3 years and is valued at \$5,000 per year; and
- ▶ Freemasons Post-Secondary Education Awards which are available for one year.

In 2019, 143 students were awarded a scholarship with the total amount paid being \$336,000.

Lodge Scholarships and Awards

During the year 46 applications were received and approved from Victorian Lodges to support their local community scholarships, bursaries and awards for primary and secondary students.

Freemasons Foundation Victoria matches funds raised and, in some cases, provides additional funding to support these awards given to local students. In 2018-2019, the total amount distributed was \$53,700.

In 2018-2019, 4 students attending Marysville Primary School, Middle Kinglake Primary School and Strathewen Primary School were awarded \$500 each. These awards were established by Freemasons Victoria after the Black Saturday fires in February 2009.

Bursaries

Bursaries are available to Post-Secondary students undertaking their first Tertiary Course who require financial assistance to continue their studies. In 2018-2019, the total amount distributed was \$17,000.

Tertiary Scholarships

During the year the Foundation supported 4 students by establishing scholarships in Agriculture/Agribusiness at La Trobe University, Longerenong College, Marcus Oldham College and The University of Melbourne.

Each scholarship of \$5,000 for one year was awarded to a student entering the final year of their course or commencing an honors year. The scholarships are part of a 3 year commitment to support students studying an agricultural course at a Victorian tertiary institution.



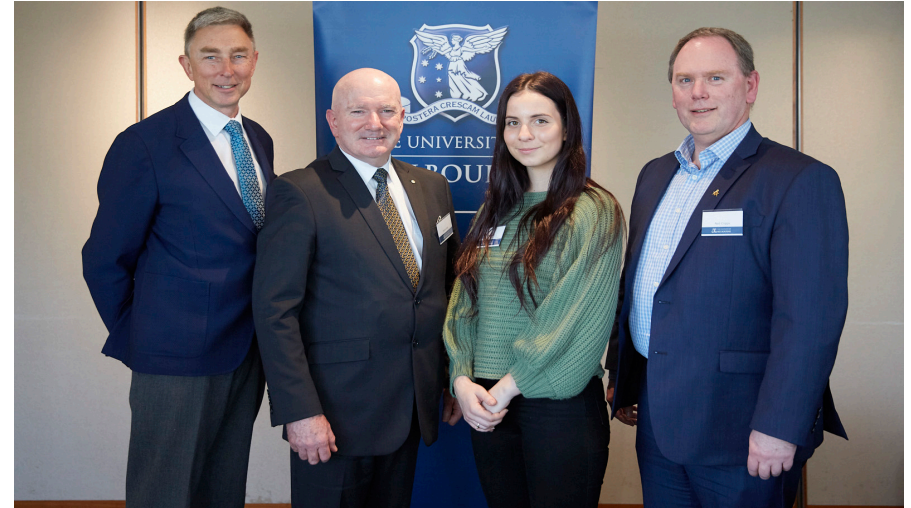
Recipients of Post-Secondary Education Awards.



Recipients of Post-Secondary Education Awards.



Recipients of Post-Secondary Education Awards.

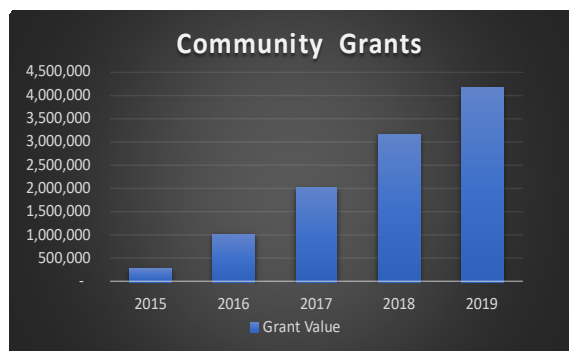


Inaugural recipient of The University of Melbourne Prize for Excellence in Agriculture Jamie Lee with Professor John Fazakerley, Myles King and Neil Cripps.

COMMUNITY GRANTS

During the year, over \$1.0m was distributed to not-for-profit organisations to support a specific project or part of a project as part of our Community Grants Program. Since November 2014 Freemasons Foundation Victoria has contributed in excess of \$4.0m under this program.

Some of the funds distributed this year were part of our ongoing commitment to Monash Health and Werribee Mercy Hospital.



Organisations supported during the year include:

- ▶ A \$30,000 grant to Monash University to purchase video conferencing equipment to provide disadvantaged Victorians access to legal advice from Monash University Community Legal Centre.

- ▶ A \$500,000 grant over 3 years to Entertainment Assist to provide ongoing mental health programs for people working in the Australian performing arts and entertainment industry.



- ▶ A \$25,000 grant to Melbourne Symphony Orchestra to assist in the cost of their 2019 Regional Tour. The regional tour will perform in Warragul, Wangaratta, Shepparton, Ballarat, Bendigo, Horsham, Hamilton and Warrnambool. As part of the Regional Tour the orchestra will also perform concerts at local primary and secondary schools.

- ▶ \$80,000 grant to Victoria Police Blue Ribbon Foundation towards a \$680,000 project for the installation of a Critical Circulatory Support Service at Eastern Health's Box Hill Hospital.

- ▶ A \$200,00 grant over 2 years to Gather My Crew who provide a free online rostering tool that connects people going through a tough time with family and friends who want to help.

- ▶ A \$30,000 grant was provided to State Schools Relief providing support for approximately 407 students across Victorian state schools. The funds were specifically used as part of the 'Affordable School Uniforms' program which provides school uniforms and other essential educational items for students in need.



As part of the \$1.8m commitment over 6 years with Monash Health, the third instalment of \$300,000 was paid in December. Since 2016, the hospital has purchased the following medical equipment for the provision of dedicated paediatric services to the Victorian community.

- ▶ 2016 - Zeiss OPMI Pentero Microscope,
- ▶ 2017 - Urodynamics Machine and Image Intensifier,
- ▶ 2018 - Mobile Xray, Vascular Ultrasound and Portable EEG.

FREEMASONS COMMUNITY GRANTS

In August 2018 a one-off program was launched for Victorian Craft Lodges to apply for a \$5,000 grant for local community charity projects.

166 successfully applied for a grant. A total of \$821,228 was distributed.

Some of the organisations/programs funded include:



\$125K

supporting disability organisations to purchase equipment to assist in the care of individuals



\$75K

to various Men's Sheds to purchase equipment and upgrade facilities



\$44K

supporting mental health assistance programs



\$85K

towards the purchase of medical equipment



\$100K

supporting youth programs



\$50K

to Victorian scouting groups to purchase equipment and upgrade facilities



\$69K

towards community facilities



\$135K

towards programs assisting individuals and families in need

We congratulate the following Lodges who participated in the Freemasons Community Grants program and supported their local community.

North West District

Cohuna Lodge
Sunraysia Daylight Lodge
Swan Hill Lodge
The Chisel Lodge
The United Memorial & Merbein Lodge
Tresco Lodge

South West District

Glenelg Lodge
Hamilton Grange Lodge
Leura Lodge
Portland Lodge of Victoria
Timboon Lodge
Warrnambool Lodge

Loddon District

Bendigo City Lodge
Carisbrook Lodge
Golden and Corinthian Lodge
Kyneton Lodge
Maryborough Lodge
Sir John Quick Lodge
Southern Cross Lodge
St.George Lodge
Talbot Lodge
Trentham Lodge

Woodend Daylight Lodge

Zetland Lodge

Goulburn District

Campaspe Valley Lodge
Goulburn Valley St. George Lodge
Kyabram Lodge
Lodge Eshcol
Mitchell Lodge
Mooroopna Lodge
Rupertswood-Numurkah Lodge
Seymour Lodge

Gippsland South/West District

Duke of Connaught Lodge
Gippsland Forest Lodge
Koo Wee Rup Lodge
Lodge Cornucopia
Old Gippsdown Lodge
Outtrim Lodge
Phillip Island Lodge
Warragul Lodge
Woolamai Daylight Lodge
Powlett Lodge

Central Highlands District

Creswick Havilah Lodge
Duke of Abercorn Lodge

Mount Franklin-St. George Lodge

Sturt-Buninyong United Lodge

United Ararat Lodge

Eureka Daylight Lodge

Wimmera District

Dimboola Lodge
Marnoo Lodge
Stewart Lodge of St. Arnaud
The Lowan Lodge
Wimmera Lodge

North East District

Albert Edward Lodge
Beechworth Lodge of St.John
Bogong Lodge
Euroa Vega Lodge
Huon Daylight Lodge
Lodge Belvoir
Mansfield Lodge
Marangan Lodge
Moyhu Valley Lodge
Myrtleford Lodge
Rutherglen Lodge
The Sir Dallas Brooks Daylight Lodge
Wangaratta Lodge of St.John
Wodonga Lodge

Yarrawonga Lodge of St.David

Gippsland East District

Argyle Lodge
Bairnsdale Daylight Lodge
Gippsland Lakes Lodge
Gippsland Lodge
King Edward Lodge
Lodge Concordia
Mitchell River Lodge
Orbost Lodge
Sale Daylight Lodge
Star of the East Lodge
Traralgon Lodge
Union Lodge of North Gippsland
Walhalla Lodge

Central District

Lodge Devotion
The Bank Place Lodge
The Francis Ormond-University Lodge
The Lodge of the Golden Fleece
Victorian Naval and Military Lodge

Bellarine Otway District

Apollo Bay Lodge
Barwong Lodge
Colac Lodge

Cosmopolitan Lodge
Geelong Lodge of Unity and Prudence
Lara Lodge
Lodge Epicurean
Lodge of the Great Ocean Road
Meredith Lodge
Moorpanyal Lodge
Rosebank Lodge
St.Andrews in the South Lodge

Bayside District

Bendigo Re-Union Lodge
Duke of Sussex Lodge
Gardenvale Mobility Lodge
Lodge Amalthea
Lodge Fraternal
Middle Park Lodge
Sandringham District Lodge
The Brighton District Lodge
The Earl of Dunmore Lodge
The King David Lodge

South East Mornington District

Allara Lodge
Baxter Lodge

Berwick Balcara Lodge
Frankston Lodge
Keysborough St. Andrews Daylight Lodge
Lawson Poole Daylight Lodge
Lodge of Honour
Lodge of Progress
Pakenham Lodge
Point Nepean Lodge
Seaford Lodge
The Mornington Lodge
The Spring Vale Lodge

Monash Gully District

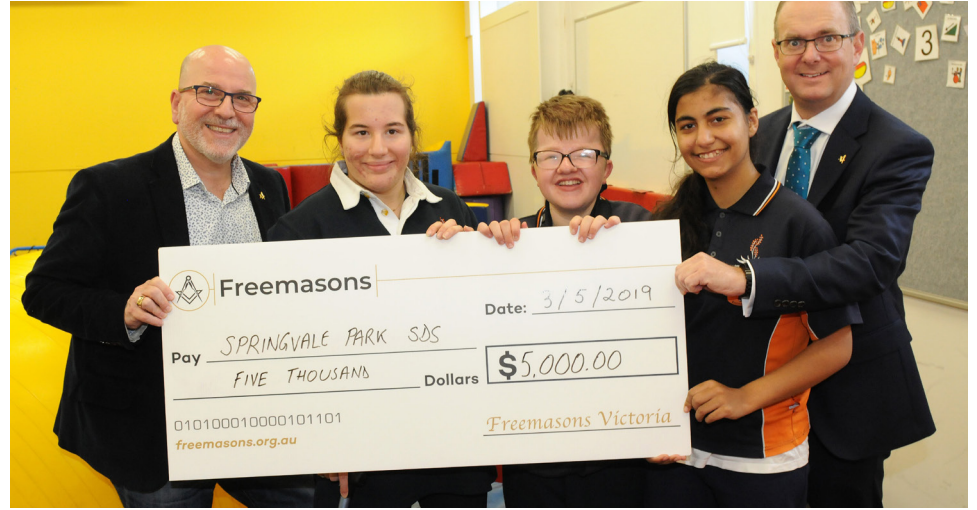
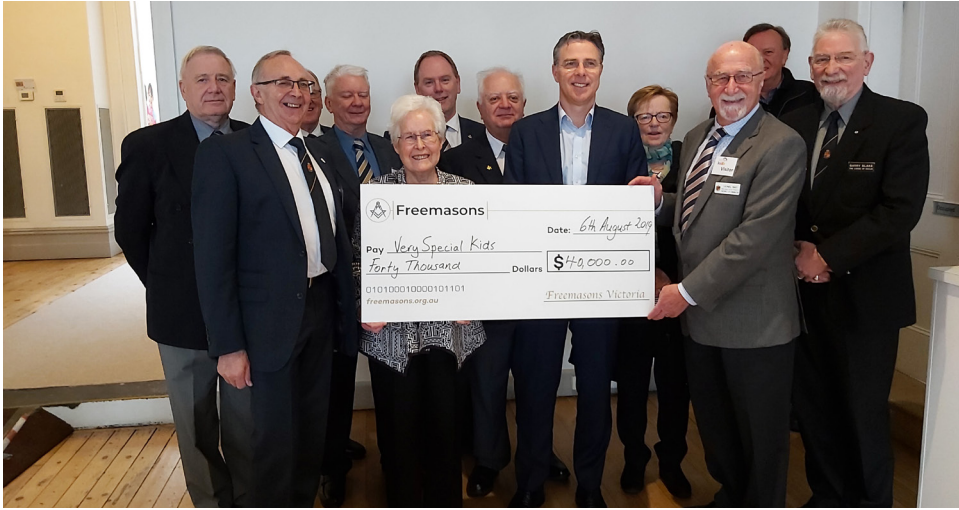
Baden Powell Lodge
Blue Dandenongs Lodge
Brae Dale Lodge
Canterbury Lodge
Lodge Liberation
Lodge Observance
Lodge of Euclid
Lodge of Good Companions
Lodge of Rapport
Lodge of the Golden Rule
Monash Lodge

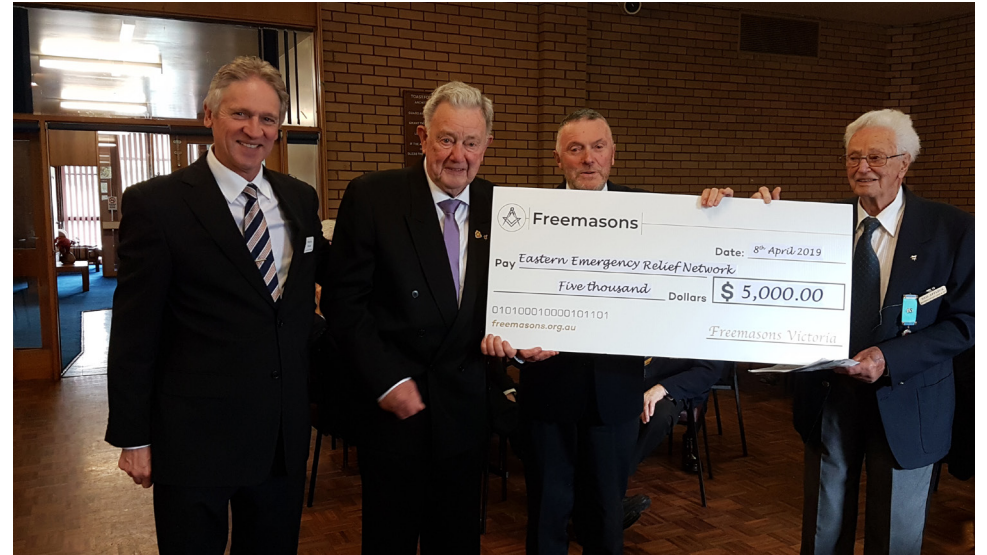
Peace and Loyalty Lodge
Warrawee Park Lodge
Blackburn United Lodge
Lodge of Australia Felix
Maroondah Daylight Lodge
Richmond Lodge
SEAVIC Lodge
The Lilydale Lodge
The United Press Lodge
Yarra Glen Lodge

Northern District

Albert Victor Lodge
Antient York Lodge
Elrona Lodge
Fairfield Lodge
Garibaldi Lodge
Ivanhoe Grammarians' Lodge
Lodge Killara
Lodge of Commerce
Lord Northcote Lodge
Macedon Ranges Lodge
Samaritan Lodge

The Diamond Valley Lodge
The Lodge Metropolis
The Revival Lodge
Whittlesea Lodge
Western District
Altona Lodge
Djerriwarrh Lodge
Maritime Lodge
North Melbourne Lodge
The Melton Lodge
The Sunshine Wisdom Lodge
Williamstown Lodge
Williamstown St.Andrew Lodge
Yarraville Lodge



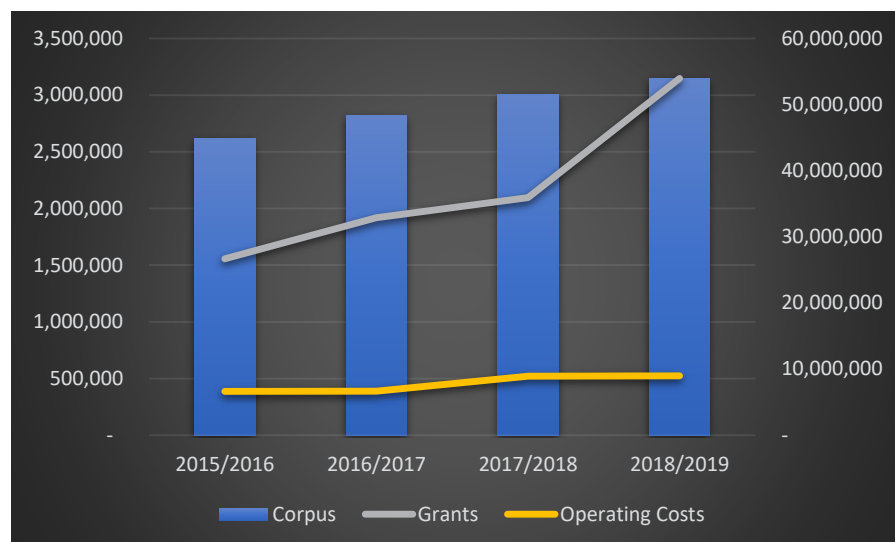


FINANCIAL SUMMARY

The Freemasons Public Charitable Foundation

Freemasons Benevolent Fund

	2019	2018	2019	2018
Investment Income	983,948	976,905	2,211,576	2,195,649
Other Income	42,888	5,529	92,259	25,199
Funds distributed	(664,533)	(656,460)	(2,483,003)	(1,438,122)
Operating expense	(127,908)	(126,475)	(396,008)	(395,009)
Net surplus/(loss) for the Year	234,395	199,499	(575,176)	387,717
Net Assets	17,495,774	16,391,113	38,361,140	37,080,041



The result was impacted by the one-off Freemasons Community Grant program, in which the Foundation distributed \$821k to local not-for-profit organisations.

3 named sub-funds have been created to provide an enduring gift. Funds received totalled \$94k.

As at 30 June 2019, the Foundation had \$54.1m of funds under management. These are administered by JBWere.

One of the key responsibilities of the Board is the monitoring of the investment activities via a robust Investment Policy with the objectives including:

- ▶ Invest in a manner that provides a level of return to fund the mission, objectives and purpose of the Foundation, its outgoings and build a legacy for the future; and
- ▶ Manage risk through prudent financial management and diversification.

CREATE A NAMED SUB-FUND AND BE REMEMBERED IN PERPETUITY

Freemasons Foundation Victoria offers you an opportunity to preserve your donation or bequest and provide a long-term gift to your chosen charities in years to come through the creation of a Named Sub-Fund.

A Named Sub-Fund can be established in either of the two charitable trusts of which Freemasons Foundation Victoria is trustee.

How does it work?

Establish

With an initial donation of **\$2,000**

Grow

Via donations and pooled fund investment returns with the objectives to achieve a rate of return to maintain real value of the corpus over time

Grant

Start granting once the balance reaches **\$11,000**

Benefits of a Named Sub-Fund

- ▶ Donations to The Freemasons Public Charitable Foundation are tax deductible.
- ▶ Long term gifts to your chosen charities.
- ▶ We manage the investment, governance and administration.
- ▶ Low fees – **0.6%**
- ▶ Families, friends, Lodges and businesses can contribute to your fund or establish their own.
- ▶ The Funds are Income Tax Exempt.
- ▶ Can create a legacy in perpetuity from your bequest.

The Freemasons Public Charitable Foundation

ABN 97 577 321 065

→
Your Tax
Deductible Donations

Your Named
Sub-fund

→
Grant
4% minimum
distribution p.a.

To Your
Chosen DGR1
Charities

Freemasons Benevolent Fund

ABN 77 505 868 957

→
Your
Donations

Your Named
Sub-fund

→
Grant

Scholarships
and Bursaries

To your
Chosen Charities



Freemasons
Foundation Victoria

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Email: foundation@freemasonsvic.net.au

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