

CSR Statement | Bellrock Advisory Pty Ltd

Updated April 2024

Bellrock's Corporate Social Responsibility (CSR) policy describes our commitment as a company, to be an ethical and engaged participant as risk advisors (insurance intermediary sector) in our local and global community.

We recognise that we have an impact on the environment we live in and the people and communities we interact with. The standards of ethics and conduct we hold ourselves to at Bellrock impact our employees, our clients, our suppliers and industry colleagues, and the people and environment we live and work amongst.

Our CSR statement describes our commitment to operate in an economically, socially and environmentally sustainable manner while acting in the interests of our stakeholders.

Measurably different

Bellrock was founded in 2007 with the vision of providing exceptional, client focused outcomes based on an open and transparent relationship between customer and risk advisor. In essence we set out to do things differently. This approach has informed our core business values and has consistently led us to question the status quo, challenging us to inspire, invent and improve the way we work, our relationships and our outcomes both within our own business and externally for the benefit of our clients and partners. The objectives outlined in this statement are a natural extension of the 'Measurably Different' ethos we live by at Bellrock which we are proud to take forward into our community.

Enshrined in our company values is our mantra of "Respect, Trustworthy, Play". Our internal staff training and development in respect of these principles is ongoing. These three words encapsulate the foundation for the way we interact with each other, our clients and our peers.

Respect: Respect for oneself as a person and as a professional, drives us to succeed and brings out the best in all of us. Respect for our colleagues, industry peers and clients necessitates a willingness to listen, understand and offer solutions of true value.

Trustworthy: Being the team-member that others can count on builds the trust we give and receive. By trusting our colleagues, we enable their strengths to shine through. By being worthy of trust we honour our role as advocates for our customers and build meaningful professional relationships within our industry.

Play: We play as a team and leave no one behind. By remembering to have fun along the way, we remain motivated professionals who genuinely enjoy what we do and we believe this is reflected in the results we achieve for our clients.

Community Engagement

Bellrock supports a range of organisations that promote positive community values through programs that deliver support and foster education and inclusion. We believe that by building partnerships with organisations that share and represent our values, not only can we make a positive impact, but the whole Bellrock team benefits from a source of continuous inspiration and a deeper understanding of issues affecting our community.

Youth and community sport initiatives

We consider that sport has a unique ability to engage and inspire, breaking down perceived barriers and driving positive outcomes across many sectors of the community.

We are proud to support the following organisations who drive positive change and outreach in our community through sport:

- Western Sydney Wanderers Foundation
- Independent Football Australia

- Triple M – Little Legends of League annual community event
- APIA Leichhardt Football club – junior football drive
- Stella Football Academy – junior football drive

Cancer support and research fundraising

Bellrock is proud to provide risk advisory services to Cancer Council NSW and further supports their mission for a cancer free future through the following fundraising activities:

- Annual Bellrock charity golf day with profits to Cancer Council.
- Corporate sponsorship of Cancer Council NSW's annual POSH Gala Ball.
- Blooms – Make A Wish Foundation golf day event. Annual participation from Bellrock in support of our long standing client Blooms' fundraising for Make A Wish Foundation.

Thought Leadership

Our team demonstrates thought leadership within our industry by creating and delivering content that educates, sparks discussion and drives awareness of key issues concerning our clients and industry peers. This written content is delivered to our audience via email campaigns, published reports and social media platforms such as LinkedIn engaging 1000's of people each month. Our extensive range of articles and resources is updated regularly and can be viewed on our website [here](#)¹.

All staff are encouraged to actively participate in seminars and events where opportunities exist to educate and inform customers, partners and the general public and to discuss and promote best practices in our industry.

Ethical sourcing and environmental sustainability

We recognise that the decisions we make as a company about the businesses we support and the partners we align ourselves with have an impact. We observe the following ethics and sustainability guidelines during the procurement process and throughout the buying cycle.

- Select local Australian businesses where possible to minimise carbon footprint and support the local economy.

- Expect suppliers to uphold fair work practices/ human rights and act in accordance with applicable laws.
- Always follow best practices when disposing of garbage, compost and recycling at our premises.
- Commitment to lowering our carbon footprint by practicing energy efficiency measures within our offices and avoiding the printing of documents wherever possible.

Employee welfare

At Bellrock our people are the heart and soul of our business and we recognise that the success of our business stems from the success and wellbeing of our team.

We aim to support our employees in realising their full potential and promote a healthy work life balance as part of our core business culture.

We commit to treating all staff fairly and consistently and promote a work place that is open, transparent and supportive. As an extension of this culture, we require all staff to conduct themselves in accordance with our anti-harassment and bullying policy and expect them to uphold the highest levels of honesty and integrity as well as comply with all legal and regulatory requirements.

As a company we ensure the safety of our employees by upholding health and safety practices within our work places.

We provide all employees with complimentary income protection insurance and uphold all statutory requirements pertaining to personal and annual leave.

Diversity & inclusion

Bellrock is committed to inclusion across race, gender, identity, age, religion & experience believing that diversity strengthens the fabric of our community and our workplace.

We encourage unique approaches and points of view and recognise these differences as a driver of positive growth and innovation.

As part of our hiring and recruitment practices we seek to reduce subconscious bias and match the best talent to the needs of our clients and the objectives of our business.

1. <https://www.bellrock.com.au/news-articles/>