



LEGACY BRISBANE  
ANNUAL REVIEW  
2023



Supporting our veterans' families.





## *The Legacy Ode*

*Fear not that you have died for naught  
The torch you threw to us we caught.  
And now our hands will hold it high  
Its glorious light shall never die,  
We'll not break faith with you who lie  
On many a field.*

*Lest we forget.*





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Callum Smith Photography

# ABOUT Legacy



Legacy is one of Australia's oldest and most trusted charities. For over a century, we have supported the families of those who gave their life or health for their country. We care for those in need, believing that the loss or injury of a veteran due to their service should not lead to social or financial disadvantage to his or her family.

## Our Mission

Legacy Brisbane strives to ensure that the partners and children of veterans who gave their lives or health can fully realise their potential.

## Our Vision

No dependant of a veteran suffers financial or social disadvantage as a result of their loved ones' death or injury.





# OUR Impact story

In 2023, we continued to care for our beneficiaries

**Over  
3,600  
Widow(er)s**



Currently supported with wellbeing contacts, social activities and linking to relevant support services across South East, Central and Western Queensland.

**118  
People  
with a  
Disability**



Participate in social activities and events, combating social isolation and linking to relevant services, such as the NDIS.

**217  
Legacy  
Youth**



Mentored through leadership and personal development skills, promoting a sense of connectedness and belonging; and assist with their transition from teenagers into adulthood.

**Over 18  
Partners  
& 46 Children**



**supporting an  
incapacitated veteran**

Engage with Legacy in times of crisis through the Family Assist Program. Legacy provides flexible and practical wellbeing and community support to medically discharged veterans and their families who have an injury or illness due to their service.

Through the work of our team of committed Legatees and staff who continue to find new innovative ways to respond to the challenges of service delivery.

**280  
Legatees**

Volunteer members who make a personal commitment to assist the families of those who served their country. Legatees are the backbone of Legacy and deliver the vast majority of our services.

**43  
Laurel and  
Care Clubs**

Groups that bring together Legacy widows in an atmosphere of friendship and caring to combat social isolation and promote peer support.

**47  
Pensions**

Granted by DVA through Legacy advocating for widows' entitlements.

**27  
Beneficiary  
events**

Including backyard assist. Providing social connection, respite and support to our beneficiaries.

Underpinned by Legacy's vision to ensure that there is no social nor financial disadvantage to the dependants of our fallen or incapacitated veterans.

**Relieving  
financial  
hardship**

We are there in times of hardship, providing financial support. We provide for basic needs, and advocate for their rights and benefits.

**Delivering  
social  
connection  
services**

We are there in times of loss and grief, providing ongoing social support to families. We work to ensure the emotional health and wellbeing of those we serve.

**Providing  
developmental  
opportunities**

We are there for the long-term, providing for the educational and development goals of families. We help those we serve to grow and thrive despite adversity.

**\$1,555,838  
spent**

On service delivery throughout the year.

# PRESIDENT'S Report



On behalf of the Board of Directors of the Legacy Club of Brisbane, I am pleased to present the Club's Annual Report and Financial Statements for the twelve months from 1 January to 31 December 2023.

Legacy's aim is to ensure that those families in our care suffer no financial or social disadvantage due to the loss or incapacitation of a veteran.

In Legacy Brisbane, our youngest dependant is 18 months old, and we have many widows over 100 years of age. We serve these families from Rockhampton in the north to Logan in the south, Moreton Island in the east and out west to our state border.

Our operations have continued to be guided by our Strategic Plan 2019-2023 which has proven to be an excellent guide to our decision-making and governance requirements. A new strategic plan will be developed in the first six months of 2024.

This annual report shows that we remain in a sound financial situation, details of which are to be found in the financial report. The most significant financial issue over the past twelve months has been the outstanding success of the Bring It Home Campaign for our new Legacy House.

At the time of writing we have achieved funding commitments totalling \$8.1 million of the \$9 million target, and we are confident that we will achieve our target by Anzac Day.

This will mean we will be able to finance the construction of our new Legacy House from funds raised and bank the proceeds of the sale of 41 Merivale St, alleviating the significant financial pressure we have been facing over the past several years.

Despite the ongoing challenges arising from COVID and continuing financial constraints we have continued to maintain our focus on our primary goal of service delivery.

We have adapted our business practices to ensure that our Legatees, staff and volunteers have the resources to meet the needs of our beneficiaries and where applicable, their families.

We have increased our focus on providing support to the families of veterans whose health has been impacted as a consequence of their service. We recognise that this will be a significant growth area in the future as the number of our traditional beneficiaries continues to decline.

Concurrently, we have continued to expand the range of our major fundraising events and have exceeded our targets on almost every occasion, despite ever increasing budget pressures faced by our very generous donors.

This has been achieved by the outstanding teamwork of our staff, volunteers and Legatees and the very generous support of the Australian Defence Force, our many corporate sponsors and donors.

Our second annual Giving Day conducted soon after Badge Week provides a good example. A number of our benefactors pledged matching funds to those raised from within the community and the multiplier effect was inspiring. We will look to replicate this success in 2024.

We continue to refine our new approach to fundraising, placing greater emphasis on corporate sponsorship. This has proven to be both a very necessary and successful supplement to the more traditional Badge Week model.

We will continue to emphasise the importance of Badge Week as it serves two very important additional objectives of maintaining the face of Legacy in the broader community and stimulating recruitment of Legatees.

Notwithstanding such success, we continue to operate in a deficit budget environment and expect to continue to do so for one more year.

Given the success of the Bring It Home Campaign, the proceeds of the sale of Legacy House, the continuing success with our fundraising events, and the anticipated improved returns on our investment portfolio, the Board is confident we will return to a balanced budget within the next eighteen months.

When viewed against the background of the turmoil arising from the impact of COVID, the ongoing impact of significant reductions in bequests, and the volatility of financial markets over the past several years, this will be a very significant achievement.

We expect to commence construction of the new Legacy House in early 2024 with an anticipated completion date of early 2025.

Once completed, the Board is confident that a new one-stop model of multi-agency service delivery to our beneficiaries and their families will establish a new standard of care across the ESO environment.

The Board gratefully acknowledges the continuing outstanding support being provided by our donors and pro-bono partners for the new Legacy House.

The Board's business continues to be affected by the paucity of Legatees and volunteers willing to serve on the various Board committees. This has been a limiting impact on the Board's capacity. We did see some improvement in 2023 as an outcome of our Recruiting and Retention Plan, but there is still room for improvement.

I wish to record the Board's appreciation for the continuing hard work of our staff, the Group Chairs, our Legatees and volunteers in providing the outstanding levels of care and support to our beneficiaries and their families throughout a very difficult year. The example they all set is quite humbling.

I wish to acknowledge the invaluable support provided to Legacy by our Joint

Patrons, Her Excellency the Honourable Dr Jeannette Young AC PSM and Professor Graeme Nimmo RFD.

2024 promises to be yet another year of challenge as we move into the second hundred years of the Legacy journey.

Our first priority will continue to be our drive to enhance our already high standards of service delivery. We will continue to develop new models of care that seek to synergise the efforts and impact on our families of other veteran focused service providers.

I plan to stand down from my appointment as President in April.

I would like to thank my fellow Directors, the staff of Legacy House,

our Legatees and volunteers for their unstinting efforts to ensure we live up to the ongoing promise to ensure that no dependant of a veteran suffers financial or social disadvantage as a result of their loved ones' death or injury.

It has been both a great privilege and an honour to serve the Legacy family.

Yours in Legacy,



**Paul Power**  
President



Photo Credit: Joseph Byford



# CEO'S Report



This year at a national level we were able to both commemorate and celebrate 100 years of service by Legacy to the families of our fallen and the families of our incapacitated veterans.

The Legacy Torch Relay that travelled from France to the UK and then onto Perth to begin its six-month journey to each Legacy Club in Australia was a wonderful opportunity for the local community to see our dependants, our Legatees, ADF members, supporters and local leadership come together to thank Legacy for what they have done, what they continue to do and what we must be prepared for in an uncertain world.

The President has advised of the outstanding success of the Bring it Home campaign as we prepare to commence the build of the New Legacy House at Greenslopes. A significant outcome of the campaign has been exposure to new philanthropic supporters, as well as corporate supporters, that are now aware, informed and engaged in Legacy and we will continue to nurture these relationships in 2024 and beyond.

During 2023, I was humbled to undertake a Churchill Fellowship

to investigate a new model of care to support families caring for an incapacitated veteran. The Fellowship visit program included two weeks in the UK and two weeks in the US visiting Government, Academic, For Purpose and veteran-centric organisations.

The findings will inform our approach to supporting families taking their veteran to Greenslopes Private Hospital and the Keith Payne Unit for their physical and psychological clinical service support.

## Dependant Programs

It has been a busy year in terms of our work with dependants. Earlier this year saw the launch of 'We Who are Left to Grow Old' [storiesofremembrance.org.au](https://storiesofremembrance.org.au), a book honouring the amazing stories of 25 of our older war widows and the Brisbane based Laurel Club.

We developed a partnership with Feel the Magic, a charity supporting grieving kids to run our first (and not last) day camp for families to help them heal after the loss of a loved one. Feedback was extremely positive and we are planning to run two more camps in 2024.

There were 27 client events including our annual youth camp in January. This does not include the Kokoda Trek which was completed by four of our young people and the visit to the Australian War Memorial on Anzac Day hosted by Canberra Legacy attended by five of our young people. The Lord Mayor's Charitable Trust also provided funding for our Laurel Groups and Care Groups to hold high tea events celebrating our Centenary.

Two large pieces of work included consulting with families and widows to complete a submission to the Royal Commission into Defence and Veteran Suicide. This was a great opportunity to advocate for our families on the impact a veteran

taking their life has on the family members. The second piece of work was to review the youth program and make recommendations on how we strengthen the support we offer our children and young people.

## Fundraising, Marketing and Communications

I continue to be humbled by the support Legacy receives from the community without whom we would not be able to fund many of our services.

Whether the support is made through a donation, participating in one of our many events, buying a Legacy bear or badge or being the beneficiary of a fundraising event we are grateful for all support we receive.

Raising awareness of the important work that Legacy does through both media and our owned marketing channel is a strategic objective and the Torch Relay certainly provided an excellent opportunity to showcase Legacy nationally. We plan to continue to build on that awareness in 2024.

## Finance and Sustainability

The complete audited 2023 Financial Statements are available on our website and will be lodged with the ACNC for public access in due course. A snapshot is provided on pages 20 to 22.

Over and above the figures in these reports, is the immeasurable contribution through the volunteer work provided by the Legatees in personally providing support to Legacy widows and families.

The Financial Statements report a surplus of \$752,216 which includes \$1,315,815 either donated or



contributed as pro bono services, specifically toward the New Legacy House.

A slightly lower operating deficit than anticipated of \$408,160 has been carefully managed as we ensure ongoing services to veterans' families and continue to build strong and diversified income streams.

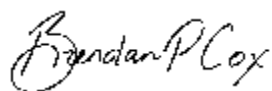
## Stakeholder Engagement

The President has mentioned the great support we have received from our local Australian Defence Force bases in South East Queensland.

In November 2023, I wrote to the Chief of Army, seeking approval to trial a 'Unit Level Legatee' concept with Units from Enoggera Army Barracks.

In December 2023, the Deputy Chief of Army as Head of the Army People System, supported the request. This concept will be trialled in 2024 at Enoggera Army Barracks.

Yours in Legacy,



**Brendan Cox**  
CEO



Photo Credit: Joseph Byford

# LEGACY Centenary

## Celebrating 100 years of Keeping the Promise

In 2023 Legacy Clubs across the country joined together to celebrate the centenary of Legacy.

A key highlight of the celebrations was the Legacy Centenary Torch Relay presented by Defence Health.

The Torch Relay commenced its journey on 23 April 2023 in Pozieres, where legend has it that the idea of Legacy began as one soldier made a promise to another to 'look after the missus and the kids'.

From there, the Torch proceeded to London. His Royal Highness, King Charles III gave The Legacy Centenary Torch Relay a royal welcome when it visited Buckingham Palace and his Majesty was presented with a Legacy Commemorative Torch by Australian Victoria Cross recipient Daniel Keighran VC.

In June, it was Legacy Brisbane's turn for the Torch to pass through our community.

On Friday June 2, the Torch Relay made its way through Rockhampton. Starting at the Rockhampton War Memorial, the Torch travelled a 9.5km route throughout the city before concluding at Rockhampton Regional Council.

On Monday June 5, the Maryborough Torch Relay started off at the Maryborough Cricket Club. The Torch travelled a 4.3km route throughout the city before concluding at Maryborough Town Hall Green.

The Sunshine Coast lived up to its name on Wednesday June 7 and produced beautiful weather for the relay. Beginning at Mooloolaba Spit Park, the Torch travelled 6.1km along

the coastline before concluding at Cotton Tree Cenotaph.

Lastly, the Torch made its way through Brisbane on Friday June 9. The relay commenced at Government House where our first torch bearers were joint patrons of our club, Her Excellency the Honourable Dr Jeannette Young AC PSM, Governor of Queensland and Professor Graeme Nimmo RFD. The Torch travelled 8.2km throughout the city before concluding at Brisbane City Hall.

Legatee Beverley Summers was one of our Torch Bearers and shared this about the experience.

*"Being selected for the Legacy Torch Relay was a real privilege. It was a wonderful experience on the day to be with fellow Legatees, War Widows, volunteers and corporate sponsors. As a Legatee, War Widow and Veteran it allowed me to totally support the valuable work in so many avenues that Legacy provides. I am very proud to be part of the Legacy family. And know that they will always be there for me."*

A huge thank you to all of our Torch Bearers for making each and every relay so special. We have loved hearing your Legacy stories and the Torch Relay would not have been possible without your support!

All up the Torch travelled over 50,000 km, through 100 stops and was carried by approximately 1,500 Torch Bearers. What an amazing way to celebrate 100 years of caring for the families of our veterans who have made the ultimate sacrifice in service of our country.







Photo Credit: Callum Smith Photography





# OLDER WIDOWS' Program

## We who are left to grow old. Stories from widows to mark a centenary of Legacy

Whilst we often hear stories from the frontline of conflicts seldom told are stories from the home front; where faced with grief and hardship the widows and children of fallen Australian Defence Force members have had to start a new life.

*We who are left to grow old* is a collection of stories from the widows of Legacy Brisbane who lost their loved one and have been affected by their partner's service in World War 2, the Korean War, the Malayan Emergency, the Vietnam War and more recent conflicts.

Published in our Centenary year, *We who are left to grow old* was made possible thanks to the Queensland Remembers Grant Program, our volunteer writers and editors and most importantly the Legacy widows who shared their stories.

Legacy President, Legatee Paul Power said about the project, *"Many of our older widows are over the age of ninety and have amazing stories of loss, grief, hardship and resilience. Their capacity to endure, to get on with their lives and raise their young families is an inspiration to us all. It is vital that we capture their remarkable stories before they are lost."*

One of the stories in the book is from Joan Bell who regularly attends the Laurel Club of South Brisbane. Her story starts...

*"I first joined Legacy in 1996 a year after my husband's passing. He served in the Merchant Navy and like many suffered from the war. I was my husband's full-time carer for many years. After his death, I was lost, looking for something or someone to share the feelings that I felt. In the*



*past 26 years Legacy has become that place..."*

This special collection of stories was officially launched by our Patrons Her Excellency the Honourable Dr Jeannette Young AC PSM, Governor of Queensland and Professor Graeme Nimmo RFD on 23 March 2023.

Copies of the book have been distributed to the widows, their families, Legatees, to the Australian War Memorial, the Queensland State Library and local libraries so that these stories of hope and resilience are not lost.





# YOUNG Families

## Caring and responding: The Royal Commission into Defence and Veteran Suicide

The Royal Commission into Defence and Veteran Suicide has shone a much-needed spotlight on the alarming statistics around veteran suicide in Australia.

Behind each statistic is a life lost and often a family who is left behind devastated and traumatised; something that Legacy knows only too well.

Over the last few years we have seen an increasing number of young widows and children coming into Legacy's care who have lost their partner or parent to suicide.

With the help of funding from the Brisbane South PHN, Legacy was able to support families to make a joint submission to the Royal Commission into Veteran suicide; as well providing postvention services to Defence families suffering from suicide loss, including one-on-one support, warm referrals to mental health and other support services and advocacy around applying for DVA entitlements and compensation.

Legacy Brisbane's submission into the Commission highlighted 10 recommendations including:

- That Defence make help-seeking behaviour a positive attribute during service and encourage referrals to relevant mental health professionals.
- Development of a memorandum of understanding between Ex-Service Organisations (ESOs) within state boundaries, to encourage collaboration and information sharing.
- That we recognise not all veterans and families want to access ESO organisations. Linking or referring families to non-ESO organisations can have additional benefits.

Legacy's submission concluded by thanking the families who shared their often-heartbreaking stories with us and acknowledging that the time and effort from veterans and families who contributed to the Commission and other previous enquiries must be honoured and their voices not lost.

In May 2023, Legacy was also able to host families at Lone Pine Sanctuary providing opportunities for engagement. New widows were able to meet others who were further through their journey and access peer support. Staff were able to interact with widows in a relaxed atmosphere to identify any wellbeing concerns and provide emotional support, referrals and advocacy as needed.

One widow wrote of her experience, *"Thank you for organising an incredible day out for us yesterday at Lone Pine; it was truly a magical day."*

*"It was my husband's birthday and what would have been our 32nd wedding anniversary; so it was a beautiful way for my daughter and I to spend the day, surrounded by so many of the animals he loved."*

Legacy Brisbane commends the establishment of a new entity to implement the Commission's final recommendations for meaningful and long-lasting cultural and systemic change and we stand ready to support families when the final report is released by the Commission in June 2024.



# THE NEW Legacy House

## Bringing it home...a new Legacy House heralds a new era of care

Legacy started with a promise on the battlefield in WW1, when an Australian soldier pledged to look after the wife and family of his dying mate. Times have changed. Our promise hasn't.

Legacy Brisbane CEO Brendan Cox explains, *"Legacy Brisbane will set a new standard of exceptional service to the families of veterans when the new Legacy House at Greenslopes opens in early 2025."*

*"The new Legacy House will be a warm, welcoming environment. A place that feels like home. A place where families will receive comprehensive support and care. A place which understands and respects their sacrifice, and which can meet their needs with warmth, understanding and efficiency."*

*"In line with Legacy's commitment to serve the families of our incapacitated veterans, the new Legacy House will deliver services in a collaborative model of care. Our vision is that Legacy House will become the one location, where veterans and their families tell their story once and are heard by all (RSL, Mates 4 Mates, Legacy) on the Southside of Brisbane that will provide the wrap around care that our veterans and their families need."*

The new Legacy House will include a collaborative cell with RSL, Mates for Mates and Open Arms co-located with Legacy. Furthermore, the location close to Greenslopes Private Hospital and the Keith Payne Unit provides the perfect location to provide complex care to families with a veteran whilst continuing to serve our older widows who frequent Greenslopes Private Hospital in their ageing years.

2023 was a significant year both for construction and the Bring it Home Campaign to raise the funds needed for the build.

Demolition of the old Red Cross building and remediation of the land was completed by Department of Veteran Affairs. Historical aspects of the Red Cross building have been preserved for installation into the new Brisbane City Council park which will be adjacent to Legacy House.

Legacy will receive \$3 million from State Government and \$1.5 million from Federal government, a significant and generous donation from Mrs Gina Rinehart AO and Hancock Prospecting towards the build, as well as contributions from other generous philanthropists and the corporate sector.

Bring it Home Campaign Chair, Mr Steven Goakes said, *"We are grateful to everyone who has contributed to the Bring it Home Campaign to date, so far we have raised \$8.1 million of our \$9 million goal. Ensuring the families of our fallen and incapacitated veterans are cared for is the responsibility of all Australians and I invite everyone in the community to help us raise the final \$900,000 to bring it home."*

Construction of the new Legacy House will start in April 2024 and be completed by early 2025 with services commencing from the new facility shortly afterwards.



**Legacy acknowledges the support of the many people and organisations who have supported our vision for the new Legacy House to date, including but not limited to:**

The Queensland State Government, the Australian Government and Brisbane City Council.

Our generous donors Mrs Gina Rinehart AO and Hancock Prospecting, BMD Group, Lexus Owners' Gift, the Australian Flag Society and Private Donors.

Our construction community of care who are providing pro bono support including Gripfast Consulting, ADP Consulting, JMac, Ashurst, Hayball, Bligh Tanner, St Hilliers, Miele and Construction Unity Group.

Our Bring it Home Campaign Patrons Mr Tim Fairfax AC and Mrs Gina Fairfax AC. Our Bring it Home Cabinet Steven Goakes (Campaign Chair), Campbell Newman AO, Daniel Keighran VC, James Jarvis, Todd Crowley, Allison Scifleet and Lorraine Hatton OAM.

And the families who contributed to the design of the building to ensure it will meet the needs of our widows and families for years to come.







# YOUTH PROGRAM Review

## Revitalizing Legacy Youth Leaders' Program

Legacy Brisbane's Youth Leadership and Development Program was developed for two key reasons – to engage with and support Legacy Youth as they transition from teenagers into adulthood and also in response to the desire our youth had to “give back” to Legacy in a meaningful way.

In 2023, Legacy Brisbane conducted an in-depth review of the Youth Leader program with input from current and former youth leaders, Legatees and staff. The program review has enabled Legacy to identify what is working well but also what could be improved.

James Wiltshire, who has been involved with the Youth Leader program since it was first established; provided insightful and critical feedback to help improve the program.

James shared, *“I've been involved in the Youth Leader program since it first started and one of the most rewarding parts has been working with the Legacy kids. As a youth leader you want to make sure the next generation has the same or an even better experience than you.”*

*“I'm now working and don't have as much time to give back to Legacy as I used to; but I was able to volunteer at the people with a disability Christmas party this year which was also a lot of fun.”*

James said that the program review was an important opportunity to look at ways Legacy could continue to support youth as they transition into adulthood.

*“I'd like to see a return to more development activities for youth leaders such as mental health first aid,”* James said.

*“I also hope we can make some of the ideas we have previously had like*

*developing a buddy system between Legacy youth leader and kids come to life.”*

James explained why Legacy will always be an important part of his life, *“I met my best friend at the first Legacy camp I attended as a kid after my father passed away.”*

*“For me first and foremost it is important that Legacy remains like a family – a community of people that you know are always going to be there for you and you will be there for them too.”*





# FAMILY ASSIST PROGRAM

## Churchill Fellowship

### Exploring International Best Practice in providing holistic support to Defence Families

In June 2023, Brendan Cox journeyed to the USA and UK to investigate international best practice in providing holistic support to Defence families supporting a veteran with physical and psychological injuries as a result of their Defence service. The trip was made possible thanks to a Paul Tys Churchill Fellowship.

Brendan said, *"The Paul Tys Churchill Fellowship enabled me to visit the US and UK where there are established For Purpose agencies engaged in veteran and family support after the veteran has left their military services environment."*

*"Many veterans transition out of military service successfully and live very fulfilling lives with their families in the communities they choose to live in. However, there are also Defence families that have a different military experience and their future potential in life is constrained by their military experiences that cause them trauma and harm. At its worst, when all options appear to have been exhausted, their poor mental health can lead to suicide."*

There is a growing body of evidence and recognition from researchers, social workers and clinical health practitioners that the health of the veteran and the health of their families are inexorably linked.

Common themes between the USA and UK included:

- Collaboration within and between clinical and non-clinical service providers;
- Integrated service delivery and case management;
- Information sharing and data management;

- Maintaining the 'Continuity of Care' in transition and avoiding delays to care;
- Use of a peer support workforce to support the veteran and carer journey;
- Social Prescribing for veteran and family; and
- Psycho education to the system providers, users and carers.

*"When considering an Australia approach to supporting the families with a veteran who has a mental health illness the above themes should form key elements of the care system,"* Brendan said.

*"The idea of a 'single front door' to enter must be a collaborative outcome of any new system. The creation of the one door ensures families can tell their story once, provide their details once, and have those details shared with consent, to a collaborative community of care."*

*"It is this collaborative model that will be delivered from the new Legacy House and then in the future rolled out across the country. This is not only achievable in Australia, it is our national and collaborative responsibility to our veterans and their families."*

Click here to  
view the report



*As the Home Base Veteran and Family Centre (US) 'motto' states: '*

*Their mission is complete, ours has just begun.'*



# PEOPLE WITH A DISABILITY

## Kathy's story

### Kathy says "Thank you!"

Many of Legacy's wonderful supporters would have seen Kathy's infectious smile and joyful attitude during our 2023 Legacy Week campaign.

Kathy was born with an intellectual disability and is a regular participant in Legacy's Explorer Program.

Her dad, Jim, was a World War II veteran who served with the 2/4 Australian Field Regiment (Australian Army) in the Middle East and New Guinea.

When Jim passed away in 2007 both Kathy and her mum Joan came into

Legacy's care. Legacy spent two years advocating for Joan to get a Gold Card which was the start of a long and lovely relationship for Joan and Kathy with those Kathy now calls her 'Legacy family'.

Kathy speaks fondly of the many social outings she has enjoyed over the years as a member of Legacy's Explorer's Club.

These social outings give our team members an important chance to connect those like Kathy who live with a disability, to other services they may need to help them live their best life.

Legacy helped Kathy to find her own accommodation which was important for Joan as she knew she wouldn't be around forever.

It was important to Joan that Kathy would have a supportive caring community to turn to when she was gone.

*"She said she wanted to join for me. She wanted me to be part of Legacy," says Kathy.*

*"Until mum died, I didn't know what living by myself was really like. Now I've got to keep going on with Legacy's help."*

*"My dad would be thinking: 'Oh I'm glad Kathy is with Legacy!'. Knowing that Legacy's helping me when I need it: my dad would say 'thank you Legacy for being with Kathy'. He was a man of very few words but I'm sure he'd say that!"*









# STORIES FROM OUR Legatees

Legatees are volunteer members who deliver the vast majority of our services. Legatees are part of Legacy's proud traditions and actively live its values.

These traditions have been passed on from generation to generation of Legatees in caring for the families of veterans.

Each year we are pleased to share stories from our Legatees in our annual review.

## John Reid – Sunshine Coast

John Reid has volunteered for Legacy since 1996, however his connection to the organisation began long before that.

As the son of a veteran, Mr Reid first became connected to Legacy when he was just two years old, following his father's passing, when he and his mother received support from the organisation.

*"Following my father's passing in Sydney when I was young, Legacy looked after my mum and myself, not just immediately but right through my time in school as well," he said.*

*"Legacy helped me receive study funding, then known as the Soldier's Children Education Scheme, when I had the opportunity to attend university, and continued to support me until I finished studying.*

*My education was followed by two years of national service then a career as a partner in a professional practice. Once I had a little more time on my hands, I joined Legacy Brisbane when I first moved to Queensland in 1996."*

John says he found volunteering with Legacy was worthwhile and rewarding.

*"I enjoy dealing with the families and the widows who we work with, who all have wonderful life stories, and I convene and offer support at the local Legacy Laurel Club, which is a meeting place for Legacy members," he said.*

## Rose Swadling OAM – Rockhampton

Legatee Rose Swadling OAM wants more Central Queenslanders to join "Australia's biggest family".

Rockhampton's former deputy mayor, Rose joined Legacy earlier this year, following decades of working with veterans and their families through army cadets, council and community service organisations like the Red Cross.

Rose's family has a long history of military service, including her father and uncles, husband, sons and grandson.

*"I felt that I had something that I could offer Legacy, being around veterans my whole life," she said.*

*"We owe it to those people who have served their country to support their families."*

*"Earlier this year I was fortunate to be able to attend the annual camp for Legacy families at Cooe Bay and it was wonderful to see the group of women and children come together as one big happy family," she said.*

*"Legacy ensures that no-one is left behind and I think that's important."*





# How you can support Legacy

## Become a Legatee



Legatees are individually assigned to the partners and children of veterans who have lost their lives or health. You can be there personally for these individuals who need it most.

## Leave a gift in your Will



A gift in your Will to Legacy is a special way to remember the fallen and care for the living. Your generosity means Legacy can be there for veterans' families when their loved one no longer can.

## Volunteer with us



There are so many ways to get involved and help Legacy keep the promise to the families of those who served our country. Legacy offers a range of short and long-term volunteer opportunities. Find a role that suits you today.

## Make a donation



Donated funds to Legacy are greatly appreciated and are used in a variety of ways. This includes things like providing child care assistance to a widow so she can continue to go to work, helping with school fees or social activities like gymnastics classes for families, or providing meals for kids at Legacy Youth Camps.

## Become a regular giver



You can support Legacy with a regular donation by direct debit, credit card or directly through your pay. Your regular support will help Legacy ensure the partners and children of our veterans' do not suffer socially or financially.

## Become a Corporate Partner



We look for long term relationships that deliver real benefits.

Your organisation's efforts will support the families of Australian Defence Force servicemen and women who have lost their lives or their health as a result of their service.

## Fundraise



Fundraising with friends, family or colleagues is a fantastic way to make an impact to the families of our servicemen and women. You can participate in one of our events or fundraise for Legacy at any time of the year.

To learn more about these opportunities please call  
07 3029 5600 or visit [legacy.com.au/get-involved](https://legacy.com.au/get-involved)

# Financials



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t: +61 7 3210 5500  
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www.uhyhnseq.com.au  
ABN 76 898 082 094

## REPORT OF THE INDEPENDENT AUDITOR ON THE SUMMARY FINANCIAL STATEMENTS

TO THE DIRECTORS OF THE LEGACY CLUB OF BRISBANE LIMITED

### OPINION

The summary financial statements, which comprise the summary statement of financial position as at 31 December 2023 and the summary statement of comprehensive income for the year then ended are derived from the audited financial report of The Legacy Club of Brisbane Limited (the Company) for the year ended 31 December 2023. We expressed a qualified audit opinion on that financial report in our report dated the 26 February 2024.

In our opinion, the accompanying summary financial statements are a fair summary of that audited financial report, on the basis described in the notes to the summary financial statements. However, the audit of the summary financial statements is restricted to the equivalent extent as the audited financial report of the Company for the year ended 31 December 2023.

### SUMMARY FINANCIAL STATEMENTS

The summary financial statements do not contain all the disclosures required by Australian Accounting Standards. Reading the summary financial statements and the auditor's report thereon, therefore, is not a substitute for reading the audited financial report and the auditor's report thereon.

### THE AUDITED FINANCIAL REPORT AND OUR REPORT THEREON

We expressed a qualified audit opinion on the audited financial report in our report dated 26 February 2024. The basis for our qualified audit opinion was based on the fact that donations, appeals and other fundraising events are a significant source of fundraising revenue for the Company. The Company has determined that it is impracticable to establish control over the collection of fundraising prior to entry into its financial records. Accordingly, as the evidence available to us regarding revenue from this source was limited, our audit procedures with respect to fundraising income had to be restricted to the amounts recorded in the financial records. We therefore were unable to express an opinion whether fundraising income of the Company recorded was complete.

### MANAGEMENT'S RESPONSIBILITY FOR THE SUMMARY

Management is responsible for the preparation of the summary financial statements on the basis described in the notes to the summary financial statements.

### AUDITOR'S RESPONSIBILITIES FOR THE AUDIT OF THE FINANCIAL REPORT

Our responsibility is to express an opinion on whether the summary financial statements are a fair summary of the audited financial report based on our procedures, which were conducted in accordance with Auditing Standard ASA 810 *Engagements to Report on Summary Financial Statements*.

**UHY Haines Norton**  
Chartered Accountants

Brisbane, 27 March 2024

**Reece Jory**  
Partner

Liability Limited by a scheme approved under Professional Standards Legislation.

UHY Haines Norton, a partnership in Brisbane (ABN 76 898 082 094) is an independent member of UHY Haines Norton an association of independent firms in Australia and New Zealand and a member of UHY, an international association of independent accounting and consulting firms.

Not your average  
bean counters...



**Summary Statement of Comprehensive Income**  
**For the Year Ended 31 December 2023**

|  | <b>2023</b>    | <b>2022</b>      |
|--|----------------|------------------|
|  | <b>\$</b>      | <b>\$</b>        |
| Total revenue from operating activities          | 5,065,120      | 3,642,277        |
| Total expenses from operating activities         | (4,325,748)    | (4,251,479)      |
| <b>Operating Surplus/ (Deficit) for the year</b> | <b>739,372</b> | <b>(609,202)</b> |
| Other income and expenses                        | 12,844         | 9,498            |
| <b>Surplus/ (Deficit) for the year</b>           | <b>752,216</b> | <b>(599,704)</b> |
| Other comprehensive income                       | 25,681         | (72,848)         |
| <b>Total comprehensive income</b>                | <b>777,897</b> | <b>(672,552)</b> |

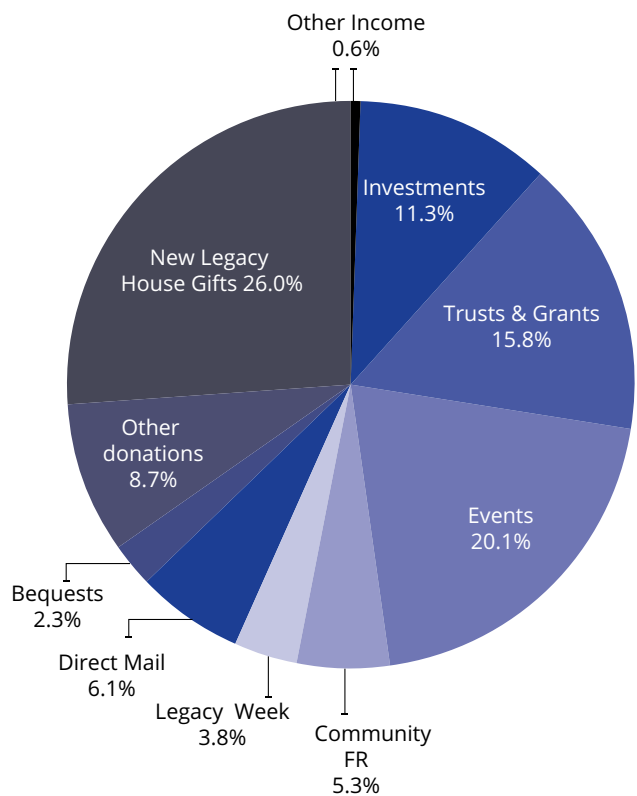
**Summary Statement of Financial Position**  
**For the Year Ended 31 December 2023**

|                               | <b>2023</b>       | <b>2022</b>       |
|-------------------------------|-------------------|-------------------|
|                               | <b>\$</b>         | <b>\$</b>         |
| Total current assets          | 1,218,272         | 1,067,771         |
| Total non-current assets      | 16,180,849        | 15,536,693        |
| <b>Total assets</b>           | <b>17,399,121</b> | <b>16,604,464</b> |
| Total current liabilities     | 709,298           | 661,484           |
| Total non-current liabilities | 688,139           | 719,193           |
| <b>Total liabilities</b>      | <b>1,397,437</b>  | <b>1,380,677</b>  |
| <b>Net assets</b>             | <b>16,001,684</b> | <b>15,223,787</b> |
| <b>Total equity</b>           | <b>16,001,684</b> | <b>15,223,787</b> |

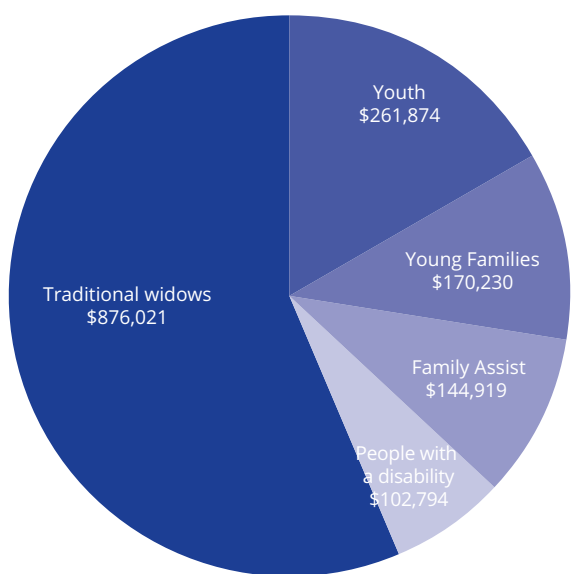
These summary financial statements have been derived from The Legacy Club of Brisbane Limited's annual financial report. The summary financial statements do not contain all the disclosures required by Australian Accounting Standards. Reading the summary financial statements, therefore, is not a substitute for reading the audited financial report of The Legacy Club of Brisbane Limited. The Legacy Club of Brisbane Limited's annual financial report is available on our website at <https://www.legacy.com.au/clubs/qld/brisbane/about-us/>.

# 2023 Financials

## 2023 Income Sources



## 2023 Community Services Program Funding



“Over and above the figures in these reports, is the immeasurable contribution through the volunteer work provided by the Legatees in personally providing support to Legacy widows and families.”

— Brendan Cox, CEO, Legacy Brisbane —



# OUR Board of Directors

President, Legacy Club of Brisbane &  
Chairman, Board of Directors

Non-executive Director & Vice President

Non-executive Director & Treasurer

Non-executive Director

Non-executive Director

Non-executive Director

Non-executive Director

Non-executive Director

Non-executive Director

Non-executive Director

Paul Power

Dr Annabel McGuire

Kerry Parry

Prof Elisabeth Findlay

Rob Murray

Simon (Don) Roach

Paul Smith

COL Gavin Ware

Todd Crowley

Anne Irwin

**We thank the following Board member  
who ended his service on the Board in 2023**

Rex Isherwood





## Supporting our veterans' families

### LEGACY BRISBANE

Legacy House, 41 Merivale Street  
South Brisbane Q 4101  
07 3029 5600  
[admin@legacybrisbane.org.au](mailto:admin@legacybrisbane.org.au)

### LEGACY SUNSHINE COAST

106 Memorial Drive  
Maroochydore Q 4558  
07 5443 9841  
[suncoast@legacybrisbane.org.au](mailto:suncoast@legacybrisbane.org.au)

### LEGACY ROCKHAMPTON & CENTRAL QUEENSLAND

Suite 3, Tobruk House  
8 Archer Street  
Rockhampton Q 4700  
07 4922 4010  
[admin@legacyrockhampton.org.au](mailto:admin@legacyrockhampton.org.au)

### LEGACY FRASER BURNETT

1 Bryant Street  
Pialba Q 4655  
07 4194 5111  
[admin@legacyfraserburnett.org.au](mailto:admin@legacyfraserburnett.org.au)

 [facebook.com/LegacyAustralia](https://facebook.com/LegacyAustralia)

 [@legacyaust](https://www.instagram.com/legacyaust)

 [linkedin.com/company/legacybrisbane](https://linkedin.com/company/legacybrisbane)

[legacy.com.au/brisbane](https://legacy.com.au/brisbane)

