

100% funding approved for charities in 2025

Across Australia, Financial Advisers are backing 51 charities in 2025, through a powerful initiative led by Milford Asset Management.

The Milford Community Connection Program was established in 2023, providing funds for Advisers to allocate to charities and not-for-profits undertaking outstanding work in their local communities. In 2025, Milford received 51 applications from Advisers nominating a range of charities. In a first for the Program, all applications will this year receive funding.

“This is an outstanding result for the Program, says Kristine Books, Chief Country Officer at Milford. “We received the highest amount of applications in our three-year history, and were able to support every nomination. We understand the important role Advisers play in their local communities, and have once again been blown away by the passion shown for these charities – it’s a privilege to support that commitment.”

The Community Connection Program is a tangible way for Milford to make an impact throughout Australia by tapping into its network of Advisers. The current recipient list takes the total number of grants to 107 – with some charities receiving their second allocation.

James Lindberg, Director and Senior Investment Adviser with Evans & Partners in Victoria nominated The Community Grocer in 2024 and again in 2025. “There are plenty of charitable groups that do fantastic work but benefit from large profiles and have access to large grants and donations,” says James. “The Community Grocer does fantastic work but, given its size, has not yet had that benefit. I thought applying for a grant on their behalf would be an amazing opportunity for them.”

Maddie Catlin, General Manager of Future2 Foundation, says her organisation is delighted to have received a grant for the second year in a row.

“Future2 is the charitable foundation of the financial services profession in Australia,” she says. “Since 2007, we have been supporting Australians in need by funding grassroots initiatives that drive real, lasting change. Through our grants program, we provide critical support to local programs that enhance financial wellbeing for young Australians, women, disadvantaged communities, and those in regional and remote areas.”

Future2 was nominated by Olivia Maragna of Aspire Retire Financial Services in Sydney. “Olivia is one of our dedicated Directors and has volunteered with Future2 since 2019. She’s passionate about the foundation’s impact and a strong advocate for rallying the profession to make a tangible difference for Australians in need.”

Maddie says this year’s grant will directly support one of Foundation2’s 2025 Make the Difference! grant recipients. “Applications open in July, and we fund programs that enhance financial wellbeing across Australia. Milford will have the opportunity to align with a recipient and see firsthand the impact of their support.”

Nominations for the next Milford Community Connection Program grants will open in February 2026. To apply or find out more information, check <https://milfordasset.com.au/milford-community-connection-program/>

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