

Beyond the Bank Member Newsletter



December 2025 edition

Hi Member,

Welcome to the latest edition of our **Beyond the Bank Member Newsletter**.

As we approach the end of another year, I want to take a moment to express my gratitude to our members. Your continued support allows us to exist for you, our member-owners.

This holiday season, we reflect on our achievements together and look forward to the opportunities that lie ahead.

In this edition, we're taking some time to reflect on the last 12 months. You'll see just a couple of great examples of how your commitment to Beyond Bank has not only helped us grow but also strengthened our community.

We wish you the very best for the holiday season ahead and the new year.

We look forward to serving you in the coming year and beyond.

Yours sincerely,

David Marshall
Chief Executive Officer
Email: dmarshall@beyondbank.com.au
Mobile: 0414 789 381

Reflecting on the last 12 months.

We've been busy over the last year creating impact in the areas that matter most to our members and communities. From major achievements to heartfelt goodbyes, here are some of the things that defined our year.



- Earning fourth place in Forbes' World's Best Banks (2025) and Canstar's Digital Banking Award – Customer Owned Banks (2025) for the eleventh straight year
- Welcoming David Marshall as the Chief Executive Officer of Beyond Bank, as we expressed our gratitude and fond farewell to Wayne Matters after almost 24 years of service
- Saying farewell to Sam Andersen, who retired after seven years as Chair and 12 years on the Beyond Bank Australia Board
- Welcoming John Evans, our new Chair of our Board, and Helen Thornton and Chris Yates (from February 2026) as new board members
- Celebrating [10 years as a Certified B Corp](#). You can read more about this major milestone further down.

[Read more in the Corporate Report](#)

Staying safe: Setting up push notifications and alerts.

Scammers are active all year round, but they tend to ramp up their activity during the festive season when we're making more purchases. Staying on top of your banking activity is more important than ever, and push notifications are one of the easiest ways to do just that.



When enabled, push notifications allow us to send real-time updates straight to your device, including:

- **fraud warnings** — so you can act quickly if something doesn't look right
- **payment confirmations** — keeping you informed when money goes in or out
- **account activity** — helping you stay in control of your finances.

We're also looking to use push notifications for critical communications like [scam alerts to help protect you from emerging threats](#). These alerts are fast, secure, and designed to keep you informed without clogging your inbox.

If you haven't enabled push notifications yet, it's a great time to consider it. You'll receive timely updates, added peace of mind, and be among the first to know when something important happens.

[How to enable push notifications and alerts](#)

Planning for aged care.

Whether you're planning for your own future or helping a parent or family member, there's a lot to consider when making the decision to move into an aged care home.



While many aspects remain the same, such as steps to entering care and the quality of care received, the fees that may be payable and the way these amounts are calculated have changed effective 1 November 2025.

The good news is, a Bridges Planner can guide you through the entry process and help ensure these important decisions are understood and addressed at the right time. This means you or your loved one can focus on the most important thing – settling into a new home.

You can learn more in this [fact sheet about planning for aged care](#).

If you want to reach our team to discuss aged care, fill out the form below or email fwcd@beyondbank.com.au and we'll be in touch.

[Get in touch](#)

Let's celebrate our B Corp anniversary!

December marks a major milestone for Beyond Bank — a whole decade of doing business for good, putting people, planet and purpose right at the heart of how we operate.



To celebrate 10 years as Australia's first B Corp Bank and to thank our members for their commitment to our B Corp success, we're running a competition in partnership with [Pablo & Rusty's Coffee](#), a fellow Certified B Corporation known for delicious coffee and sustainability leadership.

Pablo & Rusty's Coffee Roasters source, roast, and brew delicious, ethical, and sustainable coffee products. Certified as a B Corp since 2017, they are a Carbon Neutral Organisation and [1% for the planet](#) members, contributing 1% of their revenue to environmental causes. Their mission is to positively impact people and planet through coffee.

Enter for a chance to win one of 10 prizes.

We're offering members the chance to win one of 10 [P&R x HuskeeSteel cups](#) and a bag of [Pablo and Rusty's Porter St blend](#). Simply fill out the form below for a chance to win.

[Enter the competition](#)

An exclusive offer for our members: [Pablo & Rusty's Coffee](#) is offering 15% off your first purchase via their website¹, simply for being a member of a fellow B Corp. Simply add the code **BeyondB** at checkout for 15% off your first purchase.

Congratulations to our October competition winners!

\$500 cash prizes – O Stuart, D Hensby, and J Oughton.

Help us, help you.

We're keen to share information on topics that matter to you!



Help us by completing this short survey to let us know what you want to hear about. It could be emerging trends, practical strategies, or deep dives into specific areas.

Your input will guide us in creating content for future newsletters that makes a difference.

[Let us know your thoughts](#)