

<b>How to notes:</b>	
-	Green boxes are mandatory if applicable to your organisation
-	Yellow boxes are only required if the information is easily available.
-	Further <b>Guidance Notes</b> are provided on the right of each mandatory requirement

# Annual Performance Report

Organisation name	Surgical Menopause New Zealand Trust
For the year ended	3/31/2025

## Entity information

Legal name of entity	Surgical Menopause New Zealand Trust
Type of entity	Charitable trust

## Statement of Service Performance

Description of key activities	Quantity	
	Current year	Last year
<b>Establishment of the Trust</b> – Completed legal setup, developed foundational documents and internal systems, and formally assumed stewardship of an existing peer support group for New Zealand women with surgical menopause, originally created in 2022.	1	-
<b>Website launch</b> – Continued development and launched www.surgicalmenopause.nz on 18 October 2024 (World Menopause Day). The site provides accessible, evidence-based resources tailored for New Zealanders affected by surgical menopause. Work on the website began prior to the establishment of the trust and was completed under its guidance.	1	-
<b>National survey and report</b> – Revisited and completed the analysis of data from a small-scale 2022 online survey (initiated prior to the establishment of the trust) to better understand the needs of people affected by surgical menopause. Findings were published in a report released in January 2025.	1	-
<b>Online meetups</b> – Hosted monthly virtual support sessions (June 2024 – January 2025) to reduce isolation and foster peer connection.	7	-
<b>Resource development and partnerships</b> – Began developing educational materials (booklet, poster, tri-fold), recruited volunteers, and initiated outreach with relevant health organisations.	1	-
<b>Visibility and advocacy</b> – Strengthened recognition through organisational mentions and took part in awareness and advocacy initiatives to improve support and treatment access.	1	-

This performance report has been approved by those charged with governance.

Date	14-Jul-25	Date	14-Jul-25
Signature	Emilie Joyal	Signature	Rachelle M. Crosbie
Name	Emilie Joyal	Name	Rachelle M. Crosbie
Position	Chairperson/Secretary	Position	Treasurer

# Annual Performance Report

Organisation name	Surgical Menopause New Zealand Trust
For the year ended	3/31/2025

## Statement of cash received and cash paid

	Note	Current year \$	Last year \$
<b>Opening balance in bank account(s) - at the start of the financial year</b>		-	-
<b>Plus cash received from operating activities</b>			
Donations, koha, bequests and other fundraising		253	-
General grants received		-	-
Service delivery grants/contracts		-	-
Membership fees and subscriptions	2	-	-
Sale of goods or services (commercial activities)		-	-
Interest or dividends received		-	-
Other cash received		347	-
<b>Total</b>		601	-
<b>Less cash paid for operating activities</b>			
Fundraising costs		-	-
Employee remuneration and other employee related costs		-	-
Volunteer related costs		-	-
Costs related to sale of goods or services (commercial activities)	3	-	-
Other costs related to delivery of entity objectives		147	-
Grants and donations paid		-	-
Other cash paid		-	-
<b>Total</b>		147	-
<b>Total GST paid or refunded in the financial year</b>		-	-
<b>Cash surplus or (deficit) from operating activities</b>		454	-
<b>Plus cash received from other activities</b>			
Sale of investments		-	-
Sale of other assets	4	-	-
Cash received from loans and borrowings		-	-
<b>Total</b>		-	-
<b>Less cash paid for other activities</b>			
Purchase of investments		-	-
Purchase of other assets	5	-	-
Repayment of loans and borrowings		-	-
<b>Total</b>		-	-
<b>Cash surplus or (deficit) from other activities</b>		-	-
Income tax paid or refunded (if applicable)		-	-
<b>Increase/(decrease) in cash</b>		454	-
<b>Closing balance in bank account(s) - at the end of the financial year</b>		454	-
<b>Represented by:</b>			
Closing balance of bank account(s)		454	-
Balance invested in term deposit(s)		-	-
Cash on hand		-	-
<b>Total cash balances held</b>		454	-

# Annual Performance Report

Organisation name	Surgical Menopause New Zealand Trust
For the year ended	3/31/2025

## Note 1 - Accounting policies

### Basis of preparation

This performance report is prepared in accordance with the XRB's Tier 4 (NFP) Standard. The entity is permitted by law to apply this standard and has elected to do so. All transactions included in the Statement of Cash Received and Cash Paid and related notes to the Performance Report have been reported on a cash basis. The organisation commenced during the financial year on 18 June 2024. Accordingly, the Performance Report reflects a period of 9.5 months and no comparative year information exists.

### Treatment of GST

The organisation is not registered for GST and all amounts are recorded inclusive of GST (if any).

## Note 2 - Analysis of cash received from operating activities (Optional disclosure)

Category	Analysis	Current year	Last year
Donations, koha, bequests and other fundraising	Donations	253	-
	Donations and koha from trustees	347	-
Total		601	-

Category	Analysis	Current year	Last year
General grants received			
Total		-	-

Category	Analysis	Current year	Last year
Service delivery grants/contracts			
Total		-	-

Category	Analysis	Current year	Last year
Membership fees and subscriptions			
Total		-	-

Category	Analysis	Current year	Last year
Sale of goods or services (commercial activities)			
Total		-	-

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For the year ended	3/31/2025

## Note 3 - Analysis cash paid for operating activities (Optional disclosure)

Category	Analysis	Current year	Last year
Fundraising costs			
<b>Total</b>		-	-

Category	Analysis	Current year	Last year
Employee remuneration and other employee related costs			
<b>Total</b>		-	-

Category	Analysis	Current year	Last year
Volunteer related costs			
<b>Total</b>		-	-

Category	Analysis	Current year	Last year
Costs related to sale of goods or services (commercial activities)			
<b>Total</b>		-	-

Category	Analysis	Current year	Last year
Other costs related to delivery of entity objectives	Domain/email hosting	136	-
	Test printing	11	-
<b>Total</b>		147	-

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## Note 4 - Analysis of cash received from other activities (Optional disclosure)

Category	Analysis	Current year	Last year
Sale of investments			
Total		-	-

Category	Analysis	Current year	Last year
Sale of other assets			
Total		-	-

Category	Analysis	Current year	Last year
Cash received from loans and borrowings			
Total		-	-

## Note 5 - Analysis of cash paid for other activities (Optional disclosure)

Category	Analysis	Current year	Last year
Purchase of investments			
Total		-	-

Category	Analysis	Current year	Last year
Purchase of other assets			
Total		-	-

Category	Analysis	Current year	Last year
Repayment of loans and borrowings			
Total		-	-

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For the year ended	3/31/2025

## Note 6 - Significant assets

Description of asset	Current year	Last year
Land and buildings	-	-
Vehicles	-	-
Investments (shares, bonds, units in managed funds)	-	-
Amounts owed to the entity by external parties	-	-
Other significant assets	-	-

Note here whether the total monetary amounts included in the current year (and last year) columns are based on the total amount paid or an estimate (best guess) of the current value of assets held. Where an estimate of the asset is provided, disclose what this was based on (e.g. rateable values for buildings).

## Note 7 - Significant liabilities

Description of liability	Current year	Last year
Loans and other borrowings	-	-
Other amounts owed to external parties	-	-
Money held on behalf of others	-	-

## Note 8 - Related Party Transactions

Description of related party relationship	Description of the Transactions (whether in cash or amount in-kind)	Value of Transactions		Amount Outstanding	
		Current Year \$	Last Year \$	Current Year \$	Last Year \$
Trustee	Koha to support establishment of charity	25	0	0	0
Trustee	Koha to support establishment of charity	230	0	0	0
Trustee	Koha to support establishment of charity	93	0	0	0
Close family of trustee	Koha to support establishment of charity	92	0	0	0

## Note 9 - Correction of Errors

N/A
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