How to notes:

- Green boxes are mandatory if applicable to your organisation
 Yellow boxes are only required if the information is easily available.
 Further Guidance Notes 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	1
Legal name of entity	Surgical Menopause New Zealand Trust
Type of entity	Charitable trust

Statement of Service Performance

		ntity
Description of key activities	Current year	Last year
Establishment of the Trust – 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	-
Website launch – 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	-
National survey and report – 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	-
Online meetups – Hosted monthly virtual support sessions (June 2024 – January 2025) to reduce isolation and foster peer connection.	7	-
Resource development and partnerships – Began developing educational materials (booklet, poster, tri-fold), recruited volunteers, and initiated outreach with relevant health organisations.	1	-
Visibility and advocacy – 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

Organisation name

Surgical Menopause New Zealand Trust

For the year ended

3/31/2025

Statement of cash received and cash paid

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

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

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 - Allalysis	of cash received from operating activit	ies (Optional disclosure)	
	Amaluaia	Command organ	Lootypon
Category	Analysis	Current year	Last year
Donations, koha,	Donations Donations	253	-
equests and other	Donations and koha from trustees	347	-
fundraising			
	Total	601	-
Category	Analysis	Current year	Last year
General grants received			
	T-4-1		
	Total	-	-
Category	Analysis	Current year	Last year
Service delivery		Current year	Last year
grants/contracts			
grants/contracts			
	Total	-	-
Category	Analysis	Current year	Last year
Membership fees and			
subscriptions			
	Total	_	_
	Total		
Category	Analysis	Current year	Last year
Sale of goods or services (commercial activities)			
· · · · · · · · · · · · · · · · · · ·	Total	_	_

Organisation name

For the year ended

3/31/2025

Surgical Menopause New Zealand Trust

3/31/2025

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

•	cash paid for operating activities (
Category	Analysis	Current year	Last year
undraising costs			
	7.4.1		
	Total		-
Category	Analysis	Current year	Last year
Employee remuneration			•
and other employee			
related costs			
	Total	-	-
	Ameliada		
Category	Analysis	Current year	Last year
Volunteer related costs			
	Total	<u>-</u>	
	Total	-	
Category	Analysis	Current year	Last year
Costs related to sale of			
goods or services			
(commercial activities)			
	Total	-	-
Category	Analysis	Current year	Last year
Other costs related to	Domain/email hosting	136	-
delivery of entity	Test printing	11	_
objectives	19		
,			
	Total	147	-

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

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	-	-
0.1	Analysis	Currentues	Lookyoor
Cash received from loans	Analysis	Current year	Last year
and borrowings			
and borrowings			
	Total	-	-

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

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	-	-

Organisation name

Surgical Menopause New Zealand Trust		
9 · · · · · · · · · · · · · · ·		
2/21/2025		

For the year ended

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 the Transactions (whether in cash or amount inkind)	Value of Transactions		Amount Outstanding	
Description of related party relationship		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			