

Registration Number:	CC62381
Charity Name:	Surgical Menopause New Zealand Trust
Annual Return Reference:	AR002
For Year Ending:	31 March 2026

Charity Details

Legal Name:	Surgical Menopause New Zealand Trust
Trading Name:	
IRD Number:	143-185-486
NZBN Number:	9429052189791
Charity's Postal Address:	22B Frank Street Koutu Rotorua 3010
Charity's Street Address:	22B Frank Street Koutu Rotorua 3010
Phone:	
Fax:	
Email:	info@surgicalmenopause.org.nz
Website:	https://surgicalmenopause.org.nz
Facebook:	https://www.facebook.com/surgicalmenopausenz
Twitter:	
Social Network Name:	https://www.instagram.com/surgicalmenopausenz/

Primary Contact

First Name:	Emilie Joyal
Email:	joyal.emilie@gmail.com
Daytime Phone:	0224108912
Other Phone:	
Position:	Chair & Secretary

Charity Identity

Surgical Menopause New Zealand Trust identifies as an organisation with a focus on the following communities:

N/A

Officer Details

Current Officers

Name	Officer Type	Position	Position Appointment Date
Emilie Joyal	Individual	Chair & Secretary	13/06/2024
Rachelle Marie Crosbie	Individual	Treasurer	13/06/2024

Purpose & Structure

Purpose

Charitable Purpose:	Dedicated to educating and supporting women, their whanau, and the general public about the specific challenges of surgical menopause. Our mission is to provide comprehensive services, resources, and support to women who have undergone or will undergo surgical menopause, ensuring they have the information and assistance they need to navigate this significant life change.
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Structure:

Legal Structure	Charitable Trusts incorporated under the Charitable Trusts Act
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Activity, Sector and Beneficiary

Main Activity:	Provides advice / information / advocacy
Main Sector:	Health
Main Beneficiary:	General public

People

Paid work (average week)

People employed full time:	0
People employed part time:	0
Average paid hours per week:	0

Volunteer work (average year)

Total volunteers:	5
Volunteer hours:	650

Your Organisation

Reporting Tier

Tier 4

Overseas Operation

During the financial year covered by this annual return, did your charity operate (that is, carry out any of its charitable purposes) overseas?	No
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Donee Status

In the last financial year, did your charity receive donations (from the public, funders or members of your charity)?	Yes
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In the last financial year, did your charity apply (that is, spend or set aside) a minimum of 75% of its funds to charitable purposes within New Zealand?	Yes
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Combined Annual Return and Performance Report

Do you want to complete a combined Annual Return and Performance Report? Or upload your performance report?: *

Yes (Combined Annual Return and Performance Report)

Statement of Service Performance

Description of key activities:	Current Year	Last Year
Peer support & community engagement - Continued peer connection & strengthened community networks.	1	1
Resources & education - Developed & shared educational resources for people affected by surgical men	1	1
Website & awareness - Maintained information access & increased awareness of surgical menopause.	1	1
Trust development & advocacy - Strengthened organisational systems & promoted recognition & support	1	1

Statement of Cash Received and Cash Paid

	Current Year	Last Year
Opening balance in bank account(s) and cash on hand:*	453	0
<u>Plus cash received from operating activities</u>		
Donations, koha, bequests, and other fundraising:*	814	253
General grants received:*	0	0
Service delivery grants/contracts:*	0	0
Membership fees and subscriptions:*	0	0
Sale of goods & services (commercial activities):*	0	0
Interest or dividends received:*	0	0
Other cash received:*	124	347
Total cash received from operating activities:	938	600
<u>Less cash paid for operating activities</u>		
Fundraising costs:*	0	0
Employee remuneration and other employee related costs:*	0	0
Volunteer related costs:*	0	0
Costs related to sale of goods or services (commercial activities):*	0	0
Other costs related to delivery of entity objectives:*	557	147
Grants and donations paid:*	0	0
Other cash paid:*	0	0
Total cash paid for operating activities:	557	147
GST (paid) or refunded in the financial year:*	0	0
<u>Operating Surplus/Deficit</u>		
Cash surplus or (deficit) from operating activities:	381	453

Plus cash received from other activities

	Current Year	Last Year
Sale of investments:*	0	0
Sale of other assets:*	0	0
Cash received from loans and borrowings:*	0	0
Total cash received from other activities:	0	0

Less cash paid for other activities

Purchase of investments:*	0	0
Purchase of other assets:*	0	0
Repayments of loans and borrowings:*	0	0
Total cash paid for other activities:	0	0

Cash surplus or (deficit) from other activities:	0	0
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Income tax (paid) or refunded (if applicable):*	0	0
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Increase or (decrease) in cash for the year:	381	453
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Closing balance in bank account(s) and any cash on hand:	834	453
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Represented By:

Closing balance of bank account(s):*	834	453
Balance invested in term deposit(s):*	0	0
Cash on hand:*	0	0
Total cash balances held:	834	453

Notes

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.

Accounting policies

Is this your first time reporting as a charity?:*

No

Goods and Services Tax (GST)

Is the entity registered for Goods and Services Tax (GST)?:*

No (The entity is not registered for GST and all amounts are recorded inclusive of GST (if any))

Significant Assets or Liabilities

Does Surgical Menopause New Zealand Trust have any significant assets or liabilities in the current or previous financial year?

No

Related Party Transactions

Did your charity have any related party transactions in the current or previous financial year? Yes

Amount received / (paid) during year

Description of related party relationship	Description of transaction	Current Year	Last Year
Trustee	Koha to support the charity	2	0
Trustee	Koha to support the charity	122	230

Correction of Errors

Has your charity had any financial errors relating to previous years
that have been corrected in this financial year?

No

Performance Report Authorisation

The performance report must be approved by those charged with governance.

☒ I'm authorised to approve this performance report, and entering my name and date below serves as my digital signature.

This performance report has been approved by:

Name: Emilie Joyal
Position: Chair & Secretary
Date: 17 July 2026

Supporting Information

Certification

Certifying Officer: Emilie Joyal

Withhold Annual Return

Withhold annual return: No