

Annual Return Summary

Generated on:
13 May 2026

Registration Number:	CC49535
Charity Name:	Momentum Waikato Community Foundation
Annual Return Reference:	AR003
For Year Ending:	30 June 2016

Charity Details

Legal Name: Momentum Waikato Community Foundation
Trading Name: Momentum Waikato
NZBN Number: N/A

Charity's Postal Address: PO Box 9283
Waikato Mail Centre

Hamilton 3240

Charity's Street Address: 127 Alexandra Street

Hamilton Central
Hamilton 3204

Phone: 07 834 0404
Fax:
Email: cheryl@momentumwaikato.nz
Website: www.momentumwaikato.nz
Facebook: <https://www.facebook.com/MomentumWaikato/>
Twitter: <https://twitter.com/MomentumWaikato>
Social Network Name:

Charity Identity

Momentum Waikato Community Foundation identifies as an organisation with a focus on the following communities:

N/A

Officer Details

Updated Officers

Name	Officer Type	Position	Effective Date of Change
Niwa Nuri	Individual	Trustee	12/12/2016
Parekawhia McLean	Individual	Trustee	12/12/2016
Pamela Suzanna Roa	Individual	Trustee	12/12/2016
Neil Andrew Richardson	Individual	Trustee	12/12/2016
Annabel Cotton	Individual	Trustee	12/12/2016
Jonathan Harold Tanner	Individual	Trustee	12/12/2016
Kenneth Williamson	Individual	Trustee	12/12/2016
Leonard Gardner	Individual	Trustee	12/12/2016

Purpose & Structure

Purpose

Charitable Purpose:

To provide support both financial and otherwise, for Community Organisations and for any Charitable Purposes;

To promote and encourage generosity among the people of New Zealand towards Community Organisations and any Charitable Purpose;

To establish and administer separate named fund within the Trust Fund in order to fulfil the wishes of individual donors who wish to support Community Organisations and any Charitable Purpose.

Structure:

Entity Structure

The Foundation is administered by a Trust Board made up of 8 Trustees appointed by an Appointments Panel. At the first meeting of the Trust Board each year a chairperson, secretary and treasurer are elected. Investment and Distribution Committees are also in place to assist in managing the Foundation.

Activity, Sector and Beneficiary

Main Activity:

Makes grants to organisations
(including schools or other charities)

Main Sector:

Community development

Main Beneficiary:

Other charities

People

Paid work (average week)

People employed full time:	3
People employed part time:	1
Average paid hours per week:	150

Volunteer work (average year)

Total volunteers:	4
Volunteer hours:	200

Your Organisation

Reporting Tier

Tier 3

Provision of financial services

Does your charity, in its ordinary course of business, lend money (to or on behalf of others), or manage money or funds on behalf of others? No

Income Spent on charitable purposes overseas

Over the last financial year, did your charity provide any goods or services overseas? No

Over the last financial year did your Charity use any business income (e.g. sale of goods or services) for Charitable purpose overseas? No

Over the last financial year, did your charity receive donations and use any of its funds for charitable purposes overseas? No

Audit & Review

Is it a requirement of your charity's rules to have your performance report reviewed or audited? Yes

For the previous two financial years (not including the one you are reporting on), what was your charity's total operating expenditure? Less than \$500,000

Please confirm that the performance report that you are submitting has been reviewed or audited: Yes

Did the person who conducted the audit or review of your charity's accounts raise any issues of concern in their report? No

Did your charity receive a modified audit opinion for any reason other than because the charity received cash donations? No

Related party transactions

Does your charity's performance report disclose any related party transactions?

No

Statement of Financial Performance

Revenue

Donations, fundraising and other similar revenue:*	1,214,919
Fees, subscriptions and other revenue (including donations) from members:*	0
Revenue from providing goods or services:*	0
Interest, dividends and other investment revenue:*	791,464
Other revenue:	202
Total revenue:	2,006,585

Expenses

Expenses related to public fundraising:*	127,994
Volunteer and employee related payments:*	319,602
Expenses related to providing goods and services:*	0
Grants and donations made:*	20,500
Other expenses:*	33,713
Total expenses:	501,809

Surplus/deficit

Surplus/deficit:	1,504,776
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Statement of Financial Position

Current Assets

Bank accounts and cash:*	131,865
Debtors and prepayments:*	23,448
Inventory/inventories:*	0
Other current assets:*	0
Total current assets:	155,313

Non Current Assets

Property, plant and equipment:*	25,041
Investments:*	13,281,424
Other non-current assets:*	0
Total non-current assets:	13,306,465
Total assets:	13,461,778

Liabilities

Total current liabilities:*	23,423
Total non-current liabilities:*	10,000,000
Total liabilities:	10,023,423

Assets less liabilities

Total assets less total liabilities: 3,438,355

Accumulated funds

Capital contributed by owners or members:* 0

Accumulated surplus or deficits:* 3,438,355

Reserves:* 0

Total accumulated funds: 3,438,355

Supporting Information

Certification

Certifying Officer: Gemma Slack

Withhold Annual Return

Withhold annual return: No