MOMENTUM WAIKATO

Te puaawaitanga o Waikato

Annual Report 2026



Generosity that delivers

Metrics 2025-26

MOMENTUM WAIKATO
Te puaawaitanga o Waikato

$30.5M
Endowment funds under management 30 June 2026

Momentum funds (incl. WEL Trust loan) 30 June 2026 **$12.7M**

Funds raised for Community Projects

FY25-26 **$74K**

2014-2026 **$84.9M**

Total Funds invested 30 June 2026

$43.2M

Number of Gifts in Wills (Realised and Pledged)

25

Grants Distributed $

FY25-26 **$886K**

2014-2026 **$88.6M**

Grants Distributed #

FY25-26 **61**

2014-2026 **370**

Number of Endowment Funds under management **45**

Number of new Endowment Funds launched in past year **3**

Full and Part-Time Staff **5**
Volunteer Fund Champions **9**
30 June 2026

He taonga rongonui te aroha ki te tangata

Goodwill towards others is a precious treasure

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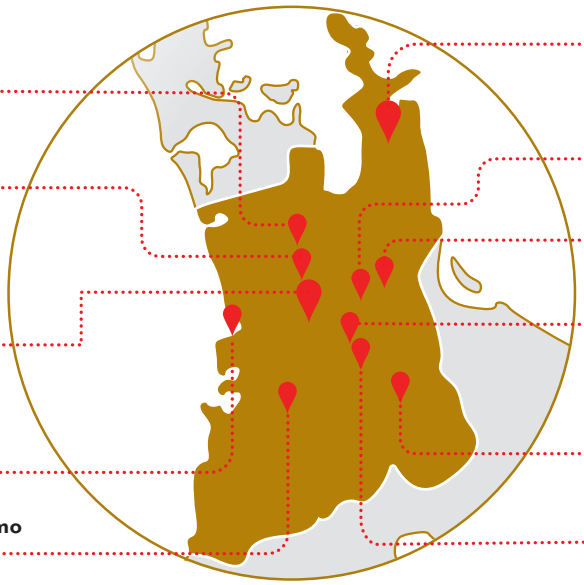
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Chair Report



Margaret Wilson
Chair

Momentum Waikato has had a busy year.

We are reviewing and re-setting our policies and organisation to ensure we are providing an effective service to our donors and region, while also continuing to launch new endowments, and pursue initiatives that inspire charitable and community giving.

One example is building our Professional Advisors' Network to connect with lawyers, accountants and wealth managers, so they can explain to their clients how to invest in their communities. This year we welcomed Pamela Storey to our team to lead this effort.

Janice Lapwood continues her invaluable work connecting with donors and developing new and existing endowments, including bringing together place-based funds in the Coromandel and working with The University of Waikato on a scholarship fund for the new Medical School's students.

We have also been fortunate to have the recently departed Dave Christiansen guide us through the year, particularly in his work with Michelle Bond to improve our financial security.

The smooth running of the organisation is thanks to the calm professionalism of Andrea Jones. And of course Mark Servian continues to tell our stories and promote our activities in a variety of forums.

We have a small but very effective team.

I have acknowledged the contribution of our staff because this is my last report prior to stepping down this coming February from the role of Chair of Momentum Waikato, after which I will continue as a Trustee until October 2027.

During my year as Chair, I have had the solid support of my fellow Trustees as we have worked together to achieve Momentum Waikato's goal of progressing the wellbeing of our communities. The organisational re-setting has seen the full commitment and engagement of the Trustees, who I thank for the generous volunteering of their time, skills and energy.

Currently we are working with our Board Appointments Panel to recruit new Trustees, as several on our current Board will soon retire at the end of their eight-year terms.

I also thank the volunteer Fund Champions and committee members who form the next ring of Momentum Waikato's people, they are all clearly enjoying the opportunity to play constructive roles that are making a real long-term difference for their communities.

Clearly, the commitment of the Trustees, the staff and the volunteer teams is the core strength of Momentum Waikato.

We acknowledge our investment partners Forsyth Barr Cambridge, Craigs Investment Partners, JBWere and Aspiring Management for their prudent portfolio management, research and support, as well as the networking opportunities they provide.

In September, Momentum Waikato hosted the conference of Community Foundations of Australia and New Zealand (CFANZ) at Claudelands. The gathering highlighted the growth of community foundations to 18 organisations with 145 Trustees and 72 staff.

The two-day programme of workshops attracted over 100 delegates from both foundations and their partner entities, creating a unique mix from financial and community organisations.

It was clear from the discussions at the event that there is a growing interest in the work of community foundations and the benefit they are bringing to their respective locales.

Concern was expressed however that, unlike many other countries, New Zealand does not have a national policy or strategy to promote charitable giving. This came up in discussions on the recent capping of tax credits for charitable giving and how it will impact many charities' capacity to benefit their communities.

Whatever the merits of that particular decision, it is clearly time New Zealand had a comprehensive framework in this important sector of our society and economy, so it is pleasing that CFANZ will be drafting such a policy, to which Momentum will contribute.

During the conference we were able to showcase the work of Momentum Waikato through the delegates having exclusive experiences at Hamilton Gardens and the Waikato Regional Theatre. Both of these amazing institutions show the benefits that flow from combining charitable giving with the hard work, organisational flair and long-term vision and strategy of smart and kind people committed to advancing their communities.

Momentum Waikato is seeking the next long-term project, though this is not getting easier in the current environment of constrained resources. Whatever it is, it will need us to again connect with a range of individuals and organisations, so we're working on an engagement strategy that focuses on the long term.

Finally, Momentum Waikato is currently in the process of appointing a new Chief Executive to work with the Board to deliver our strategic direction in 2027 and beyond.

With solid foundations and new energy about to come aboard, and thanks to the support of all who share our commitment to a better Waikato for everyone, forever, the future looks bright for Momentum Waikato.

Welcome

Chris Williams *Trustee*



Chris joined the Momentum Waikato Board in June. He is well known in Hamilton as the Director of King St Advertising, which he has owned since 1999.

For the last 15 years Chris has been Chair of Hamilton Arts Festival-Toi ora ki Kirikiriroa, now the largest regional arts festival in the land. He was founding Chair of Creative Waikato, and Chair of Clarence St Theatre when it was transferred to its Trust. He is also an active musician, composer and producer, and has so far written and produced three stage musicals.

Continuing Trustees



Dame Susan Hassall
Deputy Chair



Joan Forret



Mark Ingle



May Low
Treasurer



Holly Snape



Stephen Town

Farewell and thanks

David Christiansen *Executive Officer*



A huge thanks to Dave, who ended his time as our Executive Officer in October after two years in the position.

During his time with Momentum Waikato, Dave did a great deal to further develop the organisation's systems and improve its financial security.

Prior to joining us Dave had filled a number of challenging roles, so he is has now taken a well-deserved break, before setting out on his next chapter.

We wish Dave well in all his future endeavours.

Congratulations

A number of Momentum Waikato people received King's Honours this year, our huge congratulations to them all.

Dame Susan Hassall,

our Deputy Chair, was made a Dame Companion of the New Zealand Order of Merit, for her services to education.



Ken Williamson,

our Bequest Patron and founding Chair, was made an Officer of the New Zealand Order of Merit, for his services to governance and the community.



Kevin Burgess,

Cambridge Community Fund Champion, was made a Member of the New Zealand Order of Merit, for his services to governance, the community and sport



Dianne & Selwyn June,

founders of the Waikato Hauraki Conservation Fund, both received The King's Service Medal, for their services to wildlife conservation.



Rest in Peace

Alan Livingstone ONZM *Former Trustee*



Vale Alan Livingston! Kua hinga te tootara i Te Waonui-a-Taane.

In April, we were amongst the many Waikato people to offer deep condolences to Janet and the rest of Alan's family at the sad time of his passing.

Alan served four terms as Mayor of Waipā from 2001 to 2013 and later chaired the Waikato Regional Council from 2016 to 2019. From his Te Pahu farm, he filled numerous other public roles.

The smile and the firm handshake is how we remember Alan. A man of great mana, wisdom and integrity, he is missed.

Endowment team update



Janice Lapwood
General Manager Endowments

The Year in Review

Interest in community foundations is growing as more and more individuals, families and trusts seek meaningful ways to support their communities today and create lasting legacies for future generations.

The Momentum Waikato endowments team is building on this momentum, securing new bequests, raising awareness of our place-based funds for the Coromandel and Cambridge, and rolling out our Professional Advisor Network programme in Hamilton.

It has been a rewarding 2026, marked by significant milestones and opportunities to raise Momentum Waikato's profile. The year's activities got off to a huge start with the opening of the BNZ Theatre in January, which was followed by several Theatre tours for donors and stakeholders, and speaking engagements that included the opportunity to share project insights at a packed Waikato Chamber of Commerce 'Inspire Series' event.

A key focus has been promoting the six Coromandel place-based funds, an effort that has been well supported by dedicated volunteer Fund Champions, local media, Thames-Coromandel District Council and Craigs Investment Partners. These partnerships are all helping to build community awareness and encourage local philanthropy across the Peninsula.

The Cambridge Community Fund is also gaining traction. Its Fund Champions have been engaging with their community, attracting new named funds and strengthening their Fund's long-term growth.

Our Professional Advisor Network programme launched last year continues to evolve. Targeted content and tailored events are strengthening our relationships with lawyers, accountants and wealth managers, to support and inform their conversations with clients around charitable giving and legacy planning.

In June the John Luxton Legacy Fund was launched alongside the New Zealand National Fieldays Society and the Luxton family. As a public-facing fund, it welcomes ongoing support, with distributions intended to help members of local iwi pursue career pathways in primary sector industries.

September saw the opening of the Medieval Garden at Hamilton Gardens, for which our 'Grow the Gardens' campaign attracted and secured donations. The Mowbray family's significant contribution has been recognised through the naming of the adjoining courtyard.

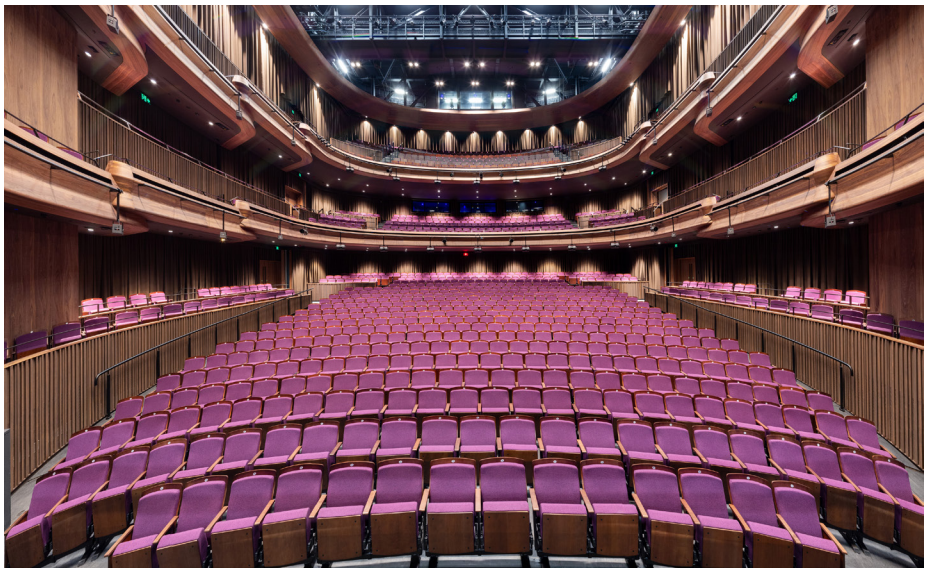
During September Wills Month, Momentum Waikato also soft-launched its 1% Campaign, designed to make conversations between professional advisors and their clients easier for leaving charitable gifts in Wills to Momentum.

Looking Ahead

Our priorities include positioning Momentum Waikato strategy to support the inter-generational transfer of wealth expected over the coming years and increasing distributions from named funds.

We will continue to strengthen the donor experience, support Professional Advisors and Fund Champions.

Through these efforts, Momentum Waikato remains committed to connecting generosity with community impact and building enduring legacies across the region and beyond.



The endowment team has been leading tours of the new BNZ Theatre. Photo: BNZ Theatre.



Farewell and thanks

Debbie Stevens *Relationship Manager*

Sincere thanks to Debbie Stevens, who pioneered our Professional Advisor Network outreach to lawyers, accountants and wealth managers from late 2024 through to the end of 2025. She kicked off a number of ongoing conversations and did a spectacular job hosting our first big 'PAN' event at the Hamilton Gardens.



Welcome

Pamela Storey *Manager: Professional Advisor Network*

Pamela joined the team in April and has continued the development of our Professional Advisor Network. She is doing a great job in encouraging lawyers, accountants and wealth managers to discuss charitable giving in Wills with their clients.

Pamela is most well-known from her six years on the Waikato Regional Council, including three as Chair up until last year. She has played numerous governance and management roles in the agriculture, education and environment sectors, including her ongoing directorship of her family's dairy agri-business.

Gifts in Wills

A gift in a Will is a powerful expression of generosity, reflecting a deep belief in a cause and a desire to make a lasting difference for future generations. At Momentum Waikato, we are incredibly grateful to those who choose to leave a gift in their Will, helping to secure our future and continue our work for years to come.

Keith Hobson - a bequest to ten charities

When I started to think about how to distribute my estate, I first thought of my personal circumstances. I have never been married, and my nieces and nephews are well catered for when it comes to their futures.

Then I thought about what I could do with my estate that would have the greatest positive effect on people now and for the foreseeable future.

I decided to set up a 'named fund' with Momentum Waikato to benefit ten charities, by leaving a bequest to Momentum in my Will. The annual income from the invested money would then be divided between the charities and the fund, so it would continue to grow, and two of the charities per year would receive a lump sum to assist them.

How did I decide on the charities?

I have recently taken up bike-packing, which involves long-distance back-country riding for which I have to carry everything I will need.

As a result, my Fund's first two charities are the Waikato Rescue Helicopter, and Bike on New Zealand Charitable Trust, who distribute bikes to children who cannot afford them.

I am very concerned about family violence, so next I supported Waitomo Waipa Women's Refuge. Also New Zealand Red Cross because of the work they do during natural disasters.

The environment is very important to me, so I chose Forest and Bird and Predator Free New Zealand. Children are the future of New Zealand, so I included Kidscan Charitable Trust. Animals matter, so I chose the SPCA New Zealand.



Keith Hobson at the Maruia Saddle near Nelson.

The last two are health related. The Cancer Society of New Zealand because they educate people on the dangers of the Sun, and the National Heart Foundation of New Zealand, because obesity and diabetes influence heart health.

I firmly believe charity begins at home.

A Raglan local - a bequest to support community's sport

He's a bloke who has lived in the popular seaside town of Raglan for many years, a keen surfer with a lifestyle and career designed to keep him at the beach.

He and his wife recently wrote their Wills, but he's asked not to be identified here as Whāingaroa is a small place.

"You never think you're going to get old, but then you realise you've only got so many summers left, you can try to ignore it, but this party IS going to end sometime," he says with a rueful smile.

"We're not rich, we just have the few odds-and-ends we've built up as we've got older, but we realised there could well be some things left behind, mainly our home here in Raglan, where we certainly want to live until we die, and which could be worth a bit.

"The money tied up in our house could be used to do some good after we're gone, but then we thought 'we want to do this, want to do that, but who's going to do it'?

"Then we talked about Momentum Waikato, because I'd seen you guys in action around the region, and we realised Momentum is the solution to all that angst, so let's get the ball rolling!"

"Knowing what Momentum has done, things like the Theatre project - that's substantial and will be there for a long time. I want to participate in something major, and you guys are gathering a funding resource that will have some real scale," he says, gesturing 'big' with his hands.

The Raglan local and his wife call their vision the 'Go Big Sports and Recreation Fund'.

"Good facilities for sport and leisure create good community. So, we thought it would be good to have a fund that will do that stuff."

"There's potential for innovation, are there opportunities here that wouldn't happen elsewhere? Raglan is unique, so what's 'recreation' in a Raglan style?



Raglan sport will benefit from a local's bequest. Photo: Mike Walen, Key Imagery.

John Luxton Legacy Fund

Backing Māori in agriculture



John Luxton, 1946-2021. Photo: DairyNZ.

It was an enormous privilege for us to launch the John Luxton Legacy Fund at Fieldays in June.

The packed-out event was hosted by Hon. Tama Potaka, Minister for Māori Development, and featured a speech by Richard Luxton, John's son, and the presentation of a pou followed by a waiata.

There was also a panel discussion featuring Richard at the Westpac tent and the Momentum Waikato team promoted the new Fund at the Dairy NZ site.

The late John Luxton from Waitoa is most well remembered as the Minister of Agriculture in the Bolger and Shipley Governments of the 1990s, and he was also an accomplished dairy farmer, company director, public board member, and international agriculture consultant.

Following his wishes, John's family set up the John Luxton Legacy Fund at Momentum Waikato to manifest his respect for Māori and his desire to open doors for them into agriculture and other primary industries, so that ultimately everyone prospers.

The Fund provides scholarships and other support for members of Waikato Tainui and Hauraki iwi to access education and training in agriculture and other primary industries.

John Luxton, 1946-2021, was a fifth-generation Waikato dairy farmer who grew up on the family farm at Waitoa. Over his lifetime he and his family built up a significant dairying business.

In 1987 John was elected as the MP for Matamata and in 1990 he was appointed as Minister of Agriculture.

John became the last Pākehā Minister of what was then called 'Māori Affairs' in 1993, a one-term role that further developed his enduring relationships with many Māori.

He was involved as a Trustee of the Waitangi Trust in the early 1990s and with the Ahuwhenua Trophy competition for Māori farming. He also served as the inaugural co-chair of the Waikato River Authority for its first decade from 2010, and was the founding chair of Pouarua Farms, a large Māori-owned dairy operation near Ngatea.

John read avidly about Māori history and at the end of his life was learning te reo, which he wished to speak proficiently to both better interact and as a sign of respect.

His window into the Māori world impressed upon him the values of honour and community and gave him a true admiration for Māoritanga. He delighted in and respected the oratory and symbolism, the wisdom of the kuia, and the mana of the late Te Arikinui Dame Te Atairangikaahu.

He recognised the historical circumstances that has resulted in many young Māori being denied the same opportunities as their Pākehā contemporaries and was very aware of the privilege his family's position as landowners had given him.

A man of the land, John was committed to raising healthy animals, producing nutritious and safe food, and protecting the environment. Like his father before him, he would often say that farming was the best career, and life, that one could have.

Before he passed away, John therefore expressed his wish to make an on-going contribution towards Māori training in agriculture, with a focus on support for the Waikato Tainui and Hauraki iwi he had worked with over the years.

You can find out more and donate to the John Luxton Legacy Fund at **momentumwaikato.nz/johnluxtonlegacyfund.**



Hon. Tama Potaka presents Richard Luxton with a pou at the launch of the John Luxton Legacy Fund at Fieldays 2026. Photo: Pamela Storey.

Jenny Lala Fund

A generous gift making a lasting difference

The incredible generosity of Hamilton's Jenny Lala has created a 'named fund' aimed at making a meaningful difference for two causes that she passionately cares about.

The Jenny Lala Fund will support special and high-level medical care for babies, and the families of children living with serious health conditions.

It will also help arts and cultural initiatives that bring communities together, including festivals, sculptures and storytelling.

Jenny's generosity is a wonderful expression of care for our community, supporting brighter futures, enriching lives and creating lasting connections.



D Lloyds' Art Fund

Emporium founder cultivates students' creativity

David Lloyd is 'world famous in Hamilton' as the name behind Davids Emporium.

In mid-2026 he set up a 'named fund' at Momentum Waikato to support primary schools' holiday art programmes, with the aim of activating children's creative thinking, enjoyment and fun, and encouraging them to get off their devices.

The 'D Lloyds' Art Fund' is named after both David and his son Dax, who died in 2025.

"The apostrophe in the fund's name comes after the S," says David.

"That's because it's for Dax as well as myself, as that's my tradition to have fun. I left the apostrophe out of 'Davids Emporium' when I named it and that drove some people mad."

David is an artist because "the simple fun of just creating something out of nothing" is addictive, and an art collector. He hosted exhibitions at his now-closed gallery near the Hamilton Lake over many years, which were mainly for "newbies" rather than established artists.

He has been involved with various Waikato schools' arts programmes for over twenty years, as he wants to pass on the joy he feels to children. D Lloyds' Art Fund therefore aims to open up students' access to activities and opportunities that enable and encourage their engagement with the visual arts.

Currently his pension goes to eight local schools that benefit from it each year - two per term.

"This enables the schools to run an accelerant art class. One school that participated in the first term was so impressed with the results that they are now paying for it to continue for the full year," says David.

"I love the concept of giving back. I would like to see people consider putting 1% of their final estate, whatever it may be, into a Momentum fund to help those who need to be helped.

"To put it simply, this is my way of saying thank you to the community that has supported me all these years. I have been so fortunate in having such a rich and full life, it is now my turn to show my thanks."

Davids Emporium opened in 1980 in Alexandra St, then moved to Hood St a couple of years later. David ran it until he sold it to his daughter and her husband in 2004, and then in 2014 they relocated back to Alexandra St.



Knighton School kids enjoy their art class. Photo: David Lloyd.

Friends of Resthaven Foundation Fund

Boosting support for Cambridge elderly

"Quite simply, we want to give our older community members choice."

That's the vision of the Friends of Resthaven Foundation Trust in Cambridge.

The retirement village and care centres run by the Cambridge Resthaven Trust offer a wide range of services, with an emphasis on providing quality, affordable facilities and support for seniors.

To boost that ethos, the Friends of Resthaven Foundation Trust came into being in 2022 via the merger of the Friends of Resthaven group started in the 1970s and the Resthaven Foundation established in 2012.

Combining its predecessors' missions of both active support and fundraising, the Foundation Trust fundraises for projects and activities that support Resthaven residents and/or the wider elderly population of Cambridge.

Don Harris, Chair of the Friends of Resthaven Foundation Trust, was introduced to the idea of an endowment fund providing a perpetual income stream by Kevin Burgess, a Fund Champion for the Cambridge Community Fund and member of the Cambridge Resthaven Trust's Board.

Together they kickstarted the 'Friends of Resthaven Foundation Trust Fund', crossing the $50,000 threshold required for an active endowment through donations from the Foundation, Kevin and his wife Jane, and an anonymous supporter.

"I've been going to rest homes to show residents that donating or leaving a gift in a Will to an endowment will help provide perpetual support for the community that has supported them through life," says Kevin.

"I've had family at the Resthaven Village and my mother used to work there, so I've wanted to do this for a while, to make it easy to give towards something that will be here in 50-100 years' time."

Don says, "it is about community by community. The Resthaven ethos is to look after the elderly."

The new Fund provides a way for anyone to donate towards that goal all year round, providing a solid ongoing base income that will boost the Foundation Trust's event-based fundraising.

You can find out more and donate to the Friends of Resthaven Foundation Fund at **momentumwaikato.nz/friendsofresthavenfoundationfund.**



Cambridge Community Fund

Fund Champions Kevin Burgess and David Cooney have been busy actively promoting the Cambridge Community Fund.

They are regularly presenting to rest homes, service groups and supporters of local for-purpose groups, which has opened a range of possibilities, including the establishment of the Friends of Resthaven Foundation Fund introduced on the previous page.

"We've been messaging that we're still in the growth phase, rather than giving out money just yet," says David.

"We haven't gone too hard on the 'heavy hitters', they'll come in their own time as they see us make it happen. It is all starting to come together and we're getting a good feel."

A big boost has come from being gifted a section in a new housing development, where they will build and then sell a house.

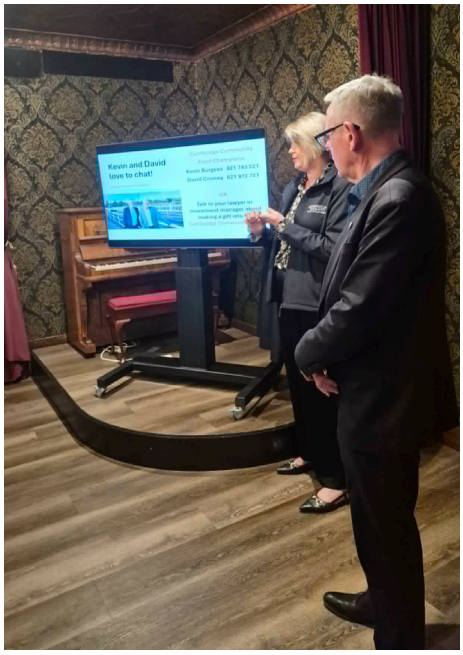
"We've got a committee together for the house project, and we'll be using our original Cambridge Community Trust as the vehicle to handle the money."

Half of the profit from the eventual sale of the house will go to three local charitable groups, and the other half will go to the Cambridge Community Fund.

"We've chosen three charities that will spin the wheels of Joe Public and have a large network of supporters, so we can leverage the connections we make to attract donations and find bequests," says David.

The Cambridge Community Fund is demonstrating what's possible when well-connected locals dedicate themselves to tangibly helping their small town to prosper.

Find out more and donate to the Cambridge Community Fund at **momentumwaikato.nz/cambridgecommunityfund.**



Janice and Kevin present at a Property Council New Zealand meeting at The Clements Hotel in July.

Coromandel Future Funds

The Coromandel Future Funds have been a priority for the Momentum Waikato team over the last eighteen months, and it is now just over a year since the launch of the Mercury Bay Future Fund featuring Sir Stephen Tindall, which kicked off the public push across the district.

Seeded with donations from Thames Coromandel District Council (TCDC) and dovetailing with a parallel initiative by some locals, the six funds have been actively promoted through a combination of on-the-ground activity and engagement with the Peninsula's various media outlets.

As profiled on the opposite page, Fund Champions have now been recruited and activated for the Mercury Bay, Thames and Whangamatā funds, with Stephen Town also ably acting as a spokesperson for the others and the overall project.

Stephen was Cyclone Recovery Lead at TCDC, where he saw the need for the Peninsula's communities to have their own funding sources.

"After Cyclone Gabrielle and the other storms around that time, it became clear that for the Coromandel to thrive, everyone needed to co-operate and invest in better infrastructure," says Stephen.

"The generosity and vision of people who choose to leave a legacy or donate now can make so much more possible. If locals in a comfortable financial position invest in their community through one or more of the Coromandel Future Funds, we will see huge possibilities become a reality."

Backing up the Fund Champions, Janice and Andrea have visited the Coromandel numerous times this year to promote the Coro Funds at 'BA5' gatherings, including the Hauraki-Coromandel Business Awards, and to the supporters of local not-for-profit groups. They've also met with a number of potential and actual donors, as well as local groups interested in setting up their own endowments.

In June, a new Coromandel Future Funds promo video was released, which opened up contact with nearly every media outlet in the district, and in turn led to advertising and editorial pieces in September and October.

The Coromandel Informer based in Whitianga has been an active supporter since the outset, with its editor Pauline Stewart regularly publishing articles and columns over the last eighteen months on the opportunity the Funds represent.

After attending the Mercury Bay launch, Coromandel FM Director Lynda Grant offered some airtime, which has seen a series of ads and interviews with Fund Champions and Momentum people broadcast through the year.

The Coromandel Future Funds are building momentum, with much more to come.

Find out more and donate to the Coromandel Future Funds at **momentumwaikato.nz/coromandelpeninsulafuturefund.**



Janice and Andrea have visited the Coromandel a number of times this year.

Meet our Fund Champions

Over the last couple of years, we have been recruiting volunteer Fund Champions to promote and represent our place-based endowments in their communities, with a couple of conservation-based funds also recently being added.



Geoff Balme

Mercury Bay Future Fund

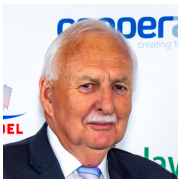
"I see my role as a Fund Champion as an opportunity to continue my service to the community here and ensure that future generations can continue to have the availability of services and facilities that make for a thriving Whitianga and surrounding area."



Kevin Burgess MNZM

Cambridge Community Fund

"Cambridge has been very good to my wife Jane and I, so I wanted to give back to the town that we love and are so passionate about. Strengthening our community by assisting those in need is the key to my involvement."



Adrian Catran JP

Thames Future Fund

"Having been in business and involved in local government here since the late 1970s, I see being a Fund Champion for the Thames Future Fund as the logical next step in the commitment I've made to this community over the last five decades."



April Chang

Thames Future Fund

"In these days of so many challenges, the Thames Future Fund just makes good sense to me. That's why I'm pleased to help spread the word so people understand how it works, and that their contribution, no matter the size, can really make an impact."



David Cooney

Cambridge Community Fund

"I am proud to champion the Cambridge Community Fund because it gives our town a practical, enduring way to look after its own. For me, it is about building a legacy that belongs to Cambridge: by local people, for local people.



Peter Farmer

Mercury Bay Future Fund

"I am proud to be a Fund Champion for the Mercury Bay Future Fund, as it enables residents and visitors to Whitianga to set aside a gift within their Will, to support the local community causes of their choice in perpetuity."



Graham Parker

Maungatautari Sanctuary Nest Egg Fund

"I grew up in the Waikato watching the Sun set over Maungatautari, so I am proud to now be a Fund Champion for the Maungatautari Sanctuary Nest Egg Fund, which is helping to 'make our Maunga sing' in perpetuity."



Don Scarlet MNZM

Maungatautari Sanctuary Nest Egg Fund and Fund for Nature Hauraki-Coromandel

"As a Fund Champion, I love that I can amplify the amazing achievements of the visionary leaders who 25 years ago conceptualised and developed the mountain as the world's largest fenced eco-sanctuary."



Stephen Town

Whangamatā Future Fund and Coromandel Peninsula Future Fund

"I offered to become a Coromandel Fund Champion because I want to support the growth of both 'giving while living' and bequests to named and untagged endowment funds during my semi-retirement."

Waikato Financial Literacy Fund

Supporting critical a local budgeting service

A North Waikato budget advice service has got a welcome boost from a Momentum Waikato endowment that helps people to prosper through better money management.

Te Kauwhata Community House has been offering its budgeting support since soon after it opened 30 years ago, and last year it received a grant from the Waikato Financial Literacy Fund, which was founded at Momentum Waikato by John and Nicola Kenel in 2023.

"Understanding money gives people more control over their lives," says John.

"It's not just about balancing the budget this week. It's about avoiding expensive mistakes and having a chance to get ahead."

"Asking for help with money can be hard," says Nicola.

"Having someone local who listens and helps you work out the next step can make a real difference to a family."

Community House Manager Lauren Hughes says people getting budget advice usually first make contact through using one of their other services, which includes a food bank, social transport, counselling, job-seeking and legal advice, and events.

"Everything is integrated here. For instance, we put notices offering help with managing money into all our food bank parcels, and our counsellor tells us when their clients need food."

People usually only come to them or are referred when they're facing an emergency.

"Many have untenable debt, maybe lost their job or got evicted. They stay with us long enough increase that financial literacy and set some goals in life," says Lauren.

Over the 2025-26 financial year, Te Kauwhata Community House ran 38 one-on-one budget advice sessions including repeat visits, each of which involved at least three hours of staff time from preparation through to follow up. There was also half as many further appointments made where the clients didn't turn up.

Nicky Patterson, the House's Budgeting Supervisor, says there are often psychological barriers to asking for help.

"There can be lots of crying, so we gently work through what's going on, how they feel, how it affects them, and then make them feel OK to tell me and build trust. We look after the whole person, and money is a part of a whole person.

"The overwhelming thing is often a sense of shame in admitting what they spend their money on. Most often it is because they have been frittering it away at the bakery, thinking it's just $10, that's not much," says Nicky.

"Some of the biggest things to overcome are the effect of social media and advertising, which promote want over need. We have clients using After Pay for food, because that's an afterthought, which is upside down. People want to 'keep up with the Jones', so will buy a new phone, and then don't realise where they're at."

Not everyone is in "a crisis space".



John and Nicola Kenel.

"We see pensioners who have managed money well all their lives but have hit a challenging milestone so need some fresh eyes on what they are doing," says Lauren.

"We're working with a couple who have some financial literacy skills but have different views on how they are doing, so it's about coming up with a mutual plan - finance is often a huge stress in relationships."

Nicky says they are seeing some good outcomes, with people consolidating their debt and being able to save enough money for emergencies and then for their goals in life.

"I saw someone in the supermarket the other day and got a big hug from them, because we'd made a real difference in her life."

Lauren says they are also making progress on preventative measures.

"We've been talking to our high school about how financial literacy sits in their social studies programme, and our healthy homes work weaves money management into its messaging around living in a sustainable way through things like managing power bills and eliminating unwanted expenses."

All this takes up volunteer time and stretches the Community House's own financial resources.

"We engaged with our community on over 12,000 occasions last year, and the grant from Momentum's Waikato Financial Literacy Fund is an important part of the puzzle that is keeping us running for another year."



You can find out more and donate to the Waikato Financial Literacy Fund at **momentumwaikato.nz/financialliteracyfund.**

Karioi Projects Fund

Campground and nursery activate restored Huntly lake

The opening of a campground and a commercial nursery at the restored Lake Kimihia are key milestones in the mission to rehabilitate the former Huntly East Mine site as a public outdoor-recreation reserve.

The project is driven by the Kimihia Lakes Community Charitable Trust, set up by Murray and Jennifer Allen to realise their vision of a Rahui Pookeka version of both Lake Karapiro and Hamilton's Lake Rotoroa.

The Karioi Projects Fund was established in 2020 by the Huntly Karioi Outdoor Trust to help fund the Kimihia redevelopment, and Momentum Waikato also provides advisory and operational support.

Kimihia Project Coordinator Charlie Young says food truck nights started happening on site in July 2026, routinely opening the gates to the public for the first time.

"That's been very well received by the community," says Charlie.

"Comments we hear are that people can't believe 'this is happening for us in Huntly', as there hasn't been such a space here for families to visit, it's got nature and water, and it's safe and there's parking!"

Huntly Karioi Outdoor Trust spokesperson Bryan Morris says, "Momentum came in very strongly for us".

"The Kimihia vision is getting close to being realised. We're rapt that we've been able to work with Momentum.

"The goal of the Huntly Karioi Outdoor Trust has always been to give kids a break from the classroom and out learning in the wilds, so that's why we got involved with Kimihia," says Bryan.

The new era gets underway over the summer of 2026-2027, with the site coming to life as the campground provides a base for trail-walking, waka ama and other outdoor recreation and training.

It is being operated by local firm Waterside Projects Ltd, which has also taken on running the on-site nursery as a commercial undertaking, meaning paid jobs at both.

"The project is energising local businesses, everybody leverages off each other. The things we wanted to have in place have now happened, jobs, recreation, community, everything is coming to fruition," says Charlie.

The Karioi Projects Fund and a parallel Karioi fund at Momentum have helped fund the creation of both the campground and the nursery. Momentum also introduced the Kimihia project to the numerous other funders that have since come on board.

Charlie says there is more to come.

"We're looking to expand the facilities in line with our master plan's goals. Classroom and accommodation cabins are what we're striving for next, and generally we're going to build up the resilience of the site with more services."

You find out more and donate to the Karioi Projects Fund at **momentumwaikato.nz/karioiprojectsfund.**



Food truck nights at Lake Kimihia have proved popular. Photo: Johnny Kenny.

Donny Fund

Continuing a legacy of generosity

The Donny Fund was born out of a significant trust transfer from the Donny Charitable Trust to Momentum Waikato in 2020, which was made to continue the generosity of the late Frank and Germaine Donny.

This brother and sister migrated from Belgium in the early twentieth century and together farmed the land of our region for decades until they passed away in the early 1990s. Neither married or had children and both felt a strong connection to the Waikato community that shaped their lives, so their intention was to ensure the fruits of their hard work would benefit the lives of others after they'd gone.

Their invested legacy has distributed millions of dollars since the 1990s, with a long-standing focus on palliative care, agricultural education and child protection.

Donny grants have supported Growing Future Farmers, pictured, the Waikato Hauraki Rural Support Trust, St Paul's Collegiate's Agri-Business programme, the Brainwave Trust, and the Midlands Sexual Assault Services Trust. End-of-life care has been a priority through the Donny Trust Specialist Palliative Care Nurse Training programme. Its funding has also provided replacement vehicles for Morrinsville Community House and Morrinsville Volunteer Fire Brigade.

The Donnys' legacy stands as a model of long-term stewardship enabling support that is woven through health, agricultural learning, child protection and the wellbeing of communities.



You can find out more and donate to the Donny Fund at **momentumwaikato.nz/donnyfund.**

Updates

Waikato Intercultural Fund

The Waikato Intercultural Fund team held the third of their 'Whiria Te Tangata-Weaving Communities Together' speaker series in March.

'Equity, Identity & Civic Courage in Aotearoa – A Panel Discussion' was timed to mark both International Women's Day and New Zealand's Race Relations Day.

Margaret Wilson, Kemi Fayomi, Jumana Fouda and Molly Āperira Huggan, pictured, shared their insights, expertise, and lived experiences, forming a clear perspective of the challenges faced by women of all ethnicities who are working to bring about positive change.

In September WIF Co-Chair Jenny Nand spoke at the Community Foundations of Aotearoa New Zealand Conference, on its theme of rebuilding social cohesion.

The WIF team have now started a quarterly 'thought leadership' email newsletter – subscribe at momentumwaikato.nz/newsletter.

Find out more and donate at **momentumwaikato.nz/waikatointerculturalfund.**



ReGen Waikato Fund

The Regen Waikato Fund is the new title for the endowment formerly known as the Waikato Catchment Ecological Enhancement Trust Fund.

The Trust set up the 'WCEET Fund' with Momentum Waikato back in 2022, and when it changed its name to ReGen in early 2026, its Fund followed suit.

The purpose remains the same. Regen Waikato exists to support the ecological health of the Lake Taupō and Waikato River catchment — enhancing and maintaining the awa, its adjoining land, indigenous biodiversity, fisheries, and game bird populations. This is achieved through funding allocated to high-impact projects that deliver genuine change and tangible outcomes.

ReGen's board includes reps from Mercury, Forest & Bird, the Advisory Committee on the Regional Environment at the Waikato Regional Council, the Department of Conservation, and Fish & Game New Zealand.

Find out more and donate at **momentumwaikato.nz/regenwaikatofund.**



Houchens Retreat

The Houchens Retreat in Glenview was gifted to Momentum Waikato by the Houchen family in 2019, so that the former clerical haven could be used for community wellbeing purposes.

For several years after that it was leased by Wise Group, who operated it as the Tirohanga Houchens Wellness Centre until they moved out last year.

A new chapter opened earlier this year when Te Whatu Ora Health NZ became the tenant and started hosting a community based residential rehabilitation programme at the site, continuing its use as a wellness facility.



Financial Report 2025-2026

FINANCIAL PERFORMANCE

REVENUE

	2026	2025
Donations, Gifts and Grants	$1,928,531	$791,483
Other	$125,821	$211,965
Finance Income	$4,748.029	$3,123,165
Total	**$6,802,381**	**$4,126,613**

EXPENSES

	2026	2025
Grants & Donations	$886,813	$2,297,959
Expenses relating to public fundraising	$198,432	$193,617
Volunteer & Employee	$605,139	$587,479
Finance Expenses	$26,917	$26,966
Other	$267,886	$260,627
Total	**$1,985,187**	**$3,366,648**
Total comprehensive income/(loss)	**$4,817,194**	**$759,965**

Full audited financial statements available on request.

FINANCIAL POSITION

ASSETS

	2026	2025
Cash and other current assets	$521,379	$269,807
Investments at Fair Value	$43,245,266	$38,619,468
Investments at Amortised Cost	–	–
Property, Plant and equipment	$26,469	$35,777
Investment Property	$2,116,709	$2,141,440
Total	**$45,909,823**	**$41,066,492**

LIABILITIES

	2026	2025
Current payables	$128,525	$127,583
WEL Energy Trust loan*	$411,209	$384,310
Other Loans	–	$1,704
Total	**$539,734**	**$513,597**
Accumulated funds	**$45,370,089**	**$40,552,895**

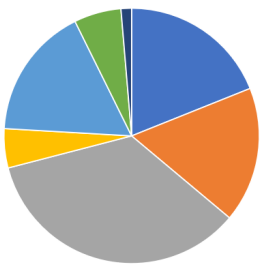
* WEL Network Loan is a concessionary loan of $10m for a term of 60 years. The loan is recognised each year on the balance sheet at its net present value.

The accounting policies applied are in accordance with NZ Generally Accepted Account Practice ('NZ GAAP'), Public Benefit Entity Standards.

INVESTMENT FUNDS

Investment funds held at 30 June 2026

NZ Equities	18.94%
Australian Equities	17.16%
International Equities	34.86%
Cash Investment Funds	4.96%
NZ Bonds	16.77%
International Bonds	5.97%
Property	1.34%



KEY PARTNERS

Services in-kind received to 30 June 2026

Aspiring Asset Management
BluTui & PAN Media
Craigs Investment Partners
Coromandel FM
DTI Lawyers
Farmers Auto Village
Forsyth Barr Cambridge
H3
JBWere
Key Imagery
Mark Hamilton Photography
Print House
WEL Energy Trust
Zealong



The core Momentum Waikato team in November 2026: Andrea Jones, Janice Lapwood, Mark Servian and Pamela Storey. See **momentumwaikato.nz/our-people#our-team**. Photo: Mark Hamilton.



The sod-turning ceremony for the Waikato Graduate School of Medicine at The University of Waikato on 5 December 2025. Momentum Waikato will be setting up an endowment for medical school scholarships and other student support. Photo: Janice Lapwood.



The opening of the Medieval Garden at Hamilton Gardens on 23 September 2026. Momentum Waikato led the fundraising for this latest attraction. See **momentumwaikato.nz/hamiltongardens**. Photo: Mark Servian.



Hamilton Mayor Tim Macindoe speaks at the opening of the Mortimer Memorial at Taitua Arboretum on 21 September 2026. The late Bunny and John Mortimer set up the first fund at Momentum back in 2015. See **momentumwaikato.nz/mortimertaituafund.** Photo: Mark Servian.



The Community Foundations of Aotearoa New Zealand Conference Dinner at the BNZ Theatre on 14 September 2026. The rest of the gathering was held at Claudelands. Photo: Mike Walen, Key Imagery.

A BETTER WAIKATO FOR EVERYONE, FOREVER

MOMENTUM WAIKATO
Te puaawaitanga o Waikato

To start a conversation about how you can create the greatest impact with your generosity, contact us on 07 834 0404 or info@momentumwaikato.nz.

momentumwaikato.nz

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Community Foundations of Aotearoa NZ
Hei whakakaha i ngā hāpori o Aotearoa