

Entity Information

**Legal Name:** The Spiritualist Church of New Zealand  
**Other Name:** Spiritualism New Zealand  
**Type of Entity & Legal Basis:** Registered Charity  
**Charity Registration Number:** CC32420

**Purpose or Mission:**

Spiritualism New Zealand's purposes are:

- to advance, promote and foster Spiritualism by supporting individuals, groups, centres and churches that are practising Spiritualism in New Zealand in their practice of Spiritualism; and
- to do all things that are conducive or incidental to the attaining of the above.

**Entity Structure:**

Spiritualism New Zealand's governance and management is conducted by a committee (the Board) which is made up of a president, a vice-president, a treasurer, a secretary, a registrar and at least three other members. The members of the Board serve for a three-year term, unless they resign, and may be re-elected for a further two terms. Any vacancies are elected at the Annual General Meeting. Membership is open to spiritual persons and organisations at the discretion of the Board. There is no maximum membership number.

The accounts are required to be reviewed.

**Main Sources of Cash and Resources are:**

- Our charity's activities are funded by membership fees.
- We have started taking the deposits for our retreat to be held in October 2023 and we expect this to break even.
- We ran two series of on-line spiritual webinars which contributed to our income.
- Healing registration fees cover the costs of healer insurance and administration.
- We ran a weekend healing workshop in Nelson which contributed a small surplus.
- We started running an on-line spiritual development class which has also contributed some extra income.
- This year the money held on behalf of the former Wellington Spiritualist Church for seed-funding any new spiritualist church in Wellington, was passed to Spiritualism New Zealand's unencumbered control. This amounted to \$18,940.26 and we wish to thank the Church and its Committee for the generous donation.

**Main Methods Used to Raise Funds:**

We do not yet hold any fundraising activities. We make small surpluses through providing the services mentioned above.

**Reliance on Volunteers and Donated Goods or Services:**

The organisation relies on gifts of volunteer time and expertise to complete all the essential roles to maintain our organisation. Members volunteer to run the Board (committee), do the administration and run the services provided. Subject matter experts from the public also volunteer their time to lead some of our webinars, for which they receive a nominal payment.

### Statement of Service Performance

#### **Description of key activities:**

To promote Spiritualism by supporting individuals, groups, centres and churches that are practising Spiritualism in New Zealand with information resources, training and the opportunity to connect.

On-line resources and information are available to members and the public at any time through our website and Facebook page.

- Our [www.spiritualism.org.nz](http://www.spiritualism.org.nz) website was redeveloped last financial year and we are continuing to add and develop more spiritual information and resources. It is becoming an increasingly popular site for members to advertise their own spiritual events and services. As a Board, we have and will continue to invest in the website and its functionality.

Description	Qty this year	Qty last year
Online information and help available through our website.		
- members' spiritual and healing events promoted	263	160
- members offering services to the public promoted in the Directory	67	42
- number of queries from the public handled	25	35

- Our Facebook page also promotes our events and other spiritual events in which we think the spiritual public may be interested and has general posts on up-beat spiritual or personal concepts. As a result, our Facebook following is growing.

Description	Qty this year	Qty last year
Number of people following our Facebook posts	1,600	1,261

We email regular newsletters to members, healers and newsletter subscribers, which contain larger articles on spiritual topics and human interest stories, and promote any events that we are running. This is a way of keeping everyone involved, especially some of our older subscribers who might be less inclined to investigate our website or Facebook page.

Description	Qty this year	Qty last year
Newsletters distributed		
- Number published for the year	12	10
- Number of newsletters distributed to members and subscribers	14,943	10,424

We attended a Spiritual Expo in the Hawkes Bay to promote spiritualism. Our other visit away was to Nelson, to run a weekend of spiritual healing training.

Description	Qty this year	Qty last year
Trips to promote spiritualism / Spiritual healing		
- Number of location-visits: Napier, Nelson (Last Year: Nelson)	2	1
- Number of places filled in the training workshops	18	12

We are aware that many of our followers are in remote areas of New Zealand where there is limited access to spiritual information and resources of any kind. This year we again ran two series of weekly spiritual webinars over six weeks each, in which anyone with a computer/smartphone and internet access could participate and/or watch the recorded event afterwards.

- *"Please can you pass on to Lisa that it was just amazing and deeply powerful."* – KL
- *"Just a wee thank you to you and the Team and of course the very magnificent Lisa Lulu, for sharing this experience with us all. It was fun, well organised, most interesting and magical. It's the resonance that is so empowering for all that synchronically attend!"* –MJ
- *"It was great!"* - AP

Description	Qty this year	Qty last year
Interactive spiritual training via evening webinar		
- Number of 6-part webinars series	2	2
- Number of people attending one or more webinars	56	53

We also began an online spiritual development group for remote members who did not have access to such groups locally through centres, churches or other contacts.

Description	Qty this year	Qty last year
Spiritual development group		
- Number of sessions	28	-
- Average number of people attending each session	6	-

We continued to run weekly meditation evenings on Thursday nights free to the public. The meditation leaders change each week and they are volunteers from our spiritual community around the country. We are thankful for their generous support.

Description	Qty this year	Qty last year
Online evening meditations		
- Number of meditations	50	42
- Average number of people attending	8	15

We provide all our spiritual healers with Public Liability Insurance cover, leaving them and their organisations to focus on the services they offer. Public safety is also important to us and the organisations for whom they heal, especially as our healers can and do work with the elderly, very young and vulnerable people among their wide range of patients. Our spiritual healers are vetted through the NZ Police system every five years.

Description	Qty this year	Qty last year
Healer support		
- Number of Registered Spiritual Healers covered by our insurance	57	52
- Number of (trainee) Provisional Spiritual Healers covered	12	9
- Number of healers' police vets completed	29	9

Our cancelled 2021 retreat in Auckland was deferred to early October 2023. Planning and bookings are well underway.

In order to better understand the expectations of our members, we surveyed past and present members in June, ready to run a strategic planning session in early July. This will allow us to reset our priorities and services going forward beyond this financial year.

This performance report has been approved on behalf of those charged with governance.

Date: 3 August 2023

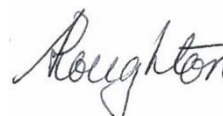
Signature:



Joanne Duncan  
President of Spiritualism New Zealand

Date: 2 August 2023

Signature:



Anne Roughton  
Treasurer of Spiritualism New Zealand

# SPIRITUALISM NEW ZEALAND

## Annual Performance Report for the 12 months to 30 June 2023

### Statement of Cash Received & Paid

For the year ended 30 June 2023

	2022/23	2021/22
<b>Cash flows from operating activities</b>		
<b>Cash was received from:</b>		
<i>Donations, koha, fundraising</i>		
Donations	100.00	125.00
	<b>100.00</b>	<b>125.00</b>
<i>Service delivery</i>		
Retreats	7,011.00	9,120.50
Webinars	2,260.00	2,830.00
Healing fees	2,760.00	1,890.00
Spiritual healing workshops	1,380.00	550.00
Development group fees	650.00	
Services on promotional trips	186.00	0
Celebrant fees	180.00	240.00
Prepaymts, overpaymts, refunds	350.72	118.48
	<b>14,777.72</b>	<b>14,748.98</b>
<i>Membership fees &amp; subscripts</i>		
Membership subscriptions	8,031.52	8,000.00
	<b>8,031.52</b>	<b>8,000.00</b>
<i>Interest received</i>		
Term investment interest	1,187.18	443.76
Bank interest	404.48	27.24
	<b>1,591.66</b>	<b>471.00</b>
<b>Total cash received</b>	<b>24,500.90</b>	<b>23,344.98</b>
<b>Less cash paid for:</b>		
<i>Volunteer related costs</i>		
Financial Reviewer honorarium	300.00	300.00
Telephone allowance	168.00	168.00
Training course		77.00
	<b>468.00</b>	<b>545.00</b>
<i>Costs related to delivery of entity objectives</i>		
Insurance	2,519.65	2,397.75
Website maint., hosting, IT	2,952.13	1,638.09
Spiritual Healing wrkshop exp	1,048.25	148.25
Webinars & on-line meetings	866.54	980.00
Other Administration costs	452.87	473.49
Promotional travel, accomodn	429.20	0
Printing & Stationery	18.95	331.89
Celebrant fees forwarded	180.00	240.00
Retreat expenses	172.27	2,992.04
Refunds	570.00	16,571.50
	<b>9,209.86</b>	<b>25,773.01</b>
<i>Other cash paid</i>		
Strategic planning	8,072.09	0
	<b>8,072.09</b>	<b>0</b>
<b>Total cash paid</b>	<b>17,749.95</b>	<b>26,318.01</b>
<b>Cash operating surplus (deficit)</b>	<b>6,750.95</b>	<b>(2,973.03)</b>
<b>Less cash paid for other activities:</b>		
<i>Purchase of other assets:</i>		
Website rebuild WIP		2,254.97
Website build		230.00
	<b>0</b>	<b>2,484.97</b>
<b>Net increase (decrease) in cash</b>	<b>6750.95</b>	<b>(5,458.00)</b>
Cash/bank at start of year	62,266.50	67,724.50
<b>Cash/bank at end of year</b>	<b>69,017.45</b>	<b>62,266.50</b>
<b>Represented by</b>		
Closing balance of bank accts	31,090.60	25,526.83
Balance invested in term depos	37,926.85	36,739.67

### Statement of Financial Performance

For the year ended 30 June 2023

	2022/23	2021/22
<b>Revenue</b>		
<i>Donations, koha, fundraising</i>		
Donations	19,040.26	125.00
	<b>19,040.26</b>	<b>125.00</b>
<i>Service delivery</i>		
Retreat	30.00	4,350.00
Webinars	2,335.00	3,030.00
Healing fees	2,790.00	1,890.00
Spiritual Healing workshop	1,320.00	720.00
Development group fees	650.00	0
Services on promotional trips	186.00	0
Celebrant fees	180.00	240.00
	<b>7,491.00</b>	<b>10,230.00</b>
<i>Membership fees &amp; subscripts</i>		
Membership subscriptions	8,105.00	8,600.00
	<b>8,105.00</b>	<b>8,600.00</b>
<i>Interest received</i>		
Term investment interest	775.51	133.20
Bank interest	404.48	27.24
	<b>1,179.99</b>	<b>160.44</b>
<b>Total revenue</b>	<b>35,816.25</b>	<b>19,115.44</b>
<b>Expenses</b>		
<i>Volunteer related costs</i>		
Financial Reviewer honorarium	300.00	300.00
Telephone allowance	168.00	168.00
Training course	0	77.00
	<b>468.00</b>	<b>545.00</b>
<i>Providing services</i>		
Insurance	2,519.65	2,397.75
Website maintenance, hosting	3,998.57	1,569.09
Spiritual Healing wrkshop exp	1,073.25	598.25
Webinars & on-line meetings	866.54	980.00
Other Administration costs	452.87	473.49
Promotional travel, accomodn	397.97	560.00
Printing & Stationery	417.86	331.89
Celebrant fees forwarded	180.00	240.00
Retreat expenses	0	2,514.45
Healing certificates & cards	18.23	18.82
	<b>9,924.94</b>	<b>9,683.74</b>
<i>Other expenses</i>		
Strategic planning	8,072.09	0
Depreciation on assets	1,048.74	540.36
Doubtful Debts	390.00	60.00
	<b>9,510.83</b>	<b>600.36</b>
<b>Total expenses</b>	<b>19,903.77</b>	<b>10,829.10</b>
<b>Net surplus (deficit)</b>	<b>15,912.48</b>	<b>8,286.34</b>
<b>Other administration costs</b>		
Bank fees	231.76	123.38
Postage	170.00	0
Charities/C Annual Return Fee	51.11	51.11
Promotional material	0	299.00
	<b>0</b>	<b>0</b>
	<b>452.87</b>	<b>473.49</b>

### Significant Assets & Liabilities

As at 30 June 2023

	<u>2022/23</u>	<u>2021/22</u>
<b><u>Significant assets</u></b>		
Bank accounts	31,090.60	25,526.83
Debtors & prepayments	10,960.66	3,805.18
Investments	37,926.85	36,739.67
<b><u>Significant liabilities</u></b>		
Money held on behalf of others	22,961.70	26,034.72

### Statement of Financial Position

As at 30 June 2023

	<u>2022/23</u>	<u>2021/22</u>
<b><u>Assets</u></b>		
<b>Current assets</b>		
<i>Cash &amp; short-term deposits:</i>		
Westpac Cheque A/c	19,567.45	13,827.46
Westpac Savings A/c	11,426.25	11,246.12
Stripe A/c	96.90	453.25
	<b>31,090.60</b>	<b>25,526.83</b>
<i>Debtors &amp; prepayments:</i>		
Debtors - Membership	7,777.00	331.52
Less Provison for Doubtful Debts	-400.00	-110.00
	7,377.00	221.52
Pre-paid Retreat Expenses	3,583.66	3,583.66
	<b>10,960.66</b>	<b>3,805.18</b>
<i>Inventory:</i>		
Stock of Healer Certificates	228.76	246.99
<b>Total current assets</b>	<b>42,280.02</b>	<b>29,579.00</b>
<b>Non-current assets</b>		
<i>Property, plant &amp; equipment:</i>		
<b>Website</b> (Cost)	3,146.22	3,146.22
Less Provision for Depreciation	-1,223.53	-174.79
Net website	<b>1,922.69</b>	<b>2,971.43</b>
<b>Banners</b> (Cost)	679.21	679.21
Less Provision for Depreciation	679.21	679.21
Net banner	<b>0</b>	<b>0</b>
	<b>1,922.69</b>	<b>2,971.43</b>
<i>Investments:</i>		
Wellington Church Term Deposit		18,752.79
SNZ Fixed Term Investment	30,592.99	10,877.22
Porirua Church Term Deposit	7,333.86	7,109.66
	<b>37,926.85</b>	<b>36,739.67</b>
<b>Total non-current assets</b>	<b>39,849.54</b>	<b>39,711.10</b>
<b>Total assets</b>	<b>82,129.56</b>	<b>69,290.10</b>
<b><u>Liabilities</u></b>		
<b>Current liabilities</b>		
<i>Creditors &amp; accrued expenses:</i>		
Creditors – Accounts payable	1,470.35	172.27
	<b>1,470.35</b>	<b>172.27</b>
<i>Other current liabilities</i>		
Prepayments	59.49	
Prepaid retreat fees	14,098.00	
	<b>14,157.49</b>	
<b>Total current liabilities</b>	<b>15,627.84</b>	<b>172.27</b>
<b>Non-current liabilities</b>		
<i>Other non-current liabilities</i>		
Seed funding obligations to:		
Wellington church		18,752.79
Porirua church	7,333.86	7,109.66
	<b>7,333.86</b>	<b>25,862.45</b>
<b>Total non-current liabilities</b>	<b>7,333.86</b>	<b>25,862.45</b>
<b>Total liabilities</b>	<b>22,961.70</b>	<b>26,034.72</b>
<b>Net assets (assets – liabilities)</b>	<b>59,167.86</b>	<b>43,255.38</b>
<b><u>Accumulated Funds</u></b>		
Accumulated surpluses at 1 July	43,255.38	34,969.04
Surplus for financial year	15,912.48	8,286.34
<b>Accumulated Funds at 30 June</b>	<b>59,167.86</b>	<b>43,255.38</b>

Notes to the Accounts

**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.

**Treatment of Goods & Services Tax (GST)**

Spiritualism New Zealand is not registered for GST and all amounts are recorded inclusive of GST (if any).

**Related Party Transactions.**

Description of related party transaction	Description of the transactions (whether in cash or amount in kind)	Value of Transactions		Amount Outstanding	
		Current Yr \$	Last Yr \$	Current Yr \$	Last Yr \$
Former member donated its residual funds upon winding up, plus interest, to SNZ.	Cash held in term deposit for 7 years by SNZ on behalf of the member, released into SNZ's control.	\$18,940.26	\$0	\$0	\$18,752.79
The Registrar's son-in-law's business provides IT hosting and support.	Charged SNZ at a discounted rate.	\$461.62	\$1006.50	\$0	\$0
Board members regularly provided their time and skills to the oversight and operation of the organization.	No charge.				

**Events after the Balance Date**

There were no undisclosed events that have occurred after the balance date that would have a significant impact on the above reports. (Last Year - Nil)