

Clan Matheson New Zealand

Performance report for the year ended 30 June 2025



**Clan Matheson
New Zealand**

Entity information

Legal name of entity	Clan Matheson New Zealand
Other name of entity	Clan Matheson New Zealand acts as the New Zealand branch of the (unincorporated) international Clan Matheson Society
Type of entity and legal basis	Trust incorporated as a charitable trust board Registered charity
Registration numbers	CC60849 NZBN 9429050807970

Entity's purpose or mission

The charitable purpose and objects of the trust are to:

- a) protect, preserve, enhance and promote the history and heritage of Clan Matheson for the educational and recreational benefit of the public
- b) encourage and support research, investigation and preservation of Scottish heritage, history and culture, particularly as it relates to Clan Matheson in Scotland and wherever in the world descendants have migrated
- c) encourage and support the study of genealogy, family history and personal heritage through promotion, information-sharing, training and preservation of material in oral, written or any other form
- d) record, publish and otherwise disseminate the heritage, history and culture of Clan Matheson
- e) promote fellowship and awareness of kinship between all present day descendants of Clan Matheson
- f) provide continuance of interests in perpetuity for the non-incorporated group originally established as the New Zealand branch of the Clan Matheson Society
- g) establish, maintain and administer a fund of money for the use of the trust
- h) work collaboratively with the Clan Matheson Society and its branches anywhere in the world
- i) work collaboratively with other Scottish clan organisations, Caledonian and Highland game societies and family history organisations, to further the objects of the trust.

Structure and governance arrangements

There were three trustees of the Clan Matheson New Zealand trust to 25 June 2025, and two after that date.

They are supported by a committee of four persons, two of whom are also trustees (to 25 June 2025).

There isn't a membership system.

There are no paid staff.

The entity is affiliated to the international Clan Matheson Society, which is based in the UK and has branches in Australia, Canada, UK/Europe and the USA. The relationship with the international society and its branches is informal.

Main sources of funds and other resources

The trust had cash reserves transferred to it by the (unincorporated) New Zealand branch of the Clan Matheson Society. It receives donations and contributions both in kind and through volunteered time.

Expenses are currently low, and we have used the time since incorporating as a charitable trust board and registration as a charity to develop new funding sources for specific activities.

Reliance on volunteers and donated goods or services

We rely on volunteers to carry out activities to further our aims. Our trustees and committee members all volunteer their time and services (e.g. travel, promotion).

Additional information

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Contact details

Email address	trust@clanmatheson.org.nz
Postal address	PO Box 10425, Wellington 6140
Website	www.clanmatheson.org.nz
Facebook group	www.facebook.com/groups/ClanMathesonNewZealand

Statement of service performance

Our outcomes

Our high-level objectives (focus areas) are to:

- foster an interest in Matheson heritage
- forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries
- help people with Matheson heritage find out more about their family history and family stories.

Key activities during 2024 – 2025

Structure and governance

The trustees are supported by a committee of volunteers. The trustees and committee members work jointly to develop an [action plan](#), and monitor and report progress against it. The plan is structured according to three focus areas that encompass the nine charitable purposes and objects of the trust.

Foster an interest in Matheson heritage

Clan Matheson in New Zealand had a standout year in 2024–2025 thanks to a **visit by the Chief of Clan Matheson**, Sir Alexander Matheson, and Lady Matheson. Clan events in Waipu, Paeroa and Dunedin gave a measurable boost to the branch's profile and people's engagement with Clan Matheson.

Our quarterly **newsletter** remains available free in electronic format to whoever wants it. People can subscribe through our website to have it emailed, or they can download current and past editions from our website. We also send it to other clan societies who share it with their members. A few people pay a subscription to have a hard copy posted to them. Readership continues to grow, and is now around 275 (225 subscribing by email plus downloads from the website).

Much of the content is relevant to people interested in Scottish heritage more widely than just Matheson heritage. The newsletter has series of articles on family history research ideas and methods, how to interest younger people in their family heritage, news of Mathesons in New Zealand and about other organisations focussed on Scottish heritage.

Our **website** remains a source of information about family history research and Matheson heritage in particular.

Clan Matheson New Zealand has a **Facebook group** for sharing news about what Mathesons are doing in New Zealand and what Clan Matheson New Zealand is doing. There are more than 500 members. For those who don't use Facebook, the posts are also added to the home page of our website.

Key activities during 2024 – 2025 (continued)

Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries

Clan Matheson New Zealand has an increasingly professional presence at identified **events**. These give people interest in Matheson heritage opportunities to meet and learn more about their heritage. Special events held as part of the visit of the Chief of Clan Matheson were a particular feature of this reporting year.

During the reporting year Clan Matheson took part in the Auckland kirkin' o' the tartan event and set up a clan tent at the Hororata, Waipu, Turakina and Paeroa Highland Games as a place for people interested in their Matheson connections and as a focus for discussions on the branch and future activities. For the second time Clan Matheson was represented in the 'clan avenue' at the Royal New Zealand Pipe Bands Association national competitions.

Our newsletter and website shares news of Clan Matheson **activities in other countries**. We in turn contribute to the annual newsletter of the international Clan Matheson Society.

Help people with Matheson heritage find out more about their family history and family stories

The newsletter and website contain a wide range of **resources** to help people with their family history research. The newsletter has a regular column on family history research techniques, which is applicable to anyone interested in finding out more about their family heritage.

A **family history forum** on the website and the Clan Matheson New Zealand Facebook group provide opportunities for people to share information about their family history and establish collaboration with others.

At the Clan Matheson New Zealand tent at events like Highland games there are opportunities for people to use **resource material** and ask questions about their family history and Scottish heritage.

Additional information:

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Statement of cash received and cash paid

	This year \$	Last year \$
Cash received		
Donations, bequests and other fundraising	2,865.00	700.00
General grants received	0.00	0.00
Service delivery grants or contracts	0.00	0.00
Fees, subscriptions and other receipts	210.00	210.00
Receipts from selling goods or providing services	0.00	0.00
Bank account interest and other investment income	289.46	249.02
Other receipts	0.00	0.00
Total receipts	3,364.46	1,159.02
Cash paid		
Fundraising costs		0.00
Employee remuneration and other costs		0.00
Volunteer-related costs		0.00
Costs related to providing goods or services		0.00
Grants and donations paid		0.00
Other payments related to delivering entity objectives	2,164.64	1,660.71
Total operating payments	2,164.64	1,660.71
Cash surplus (or deficit)	1,199.92	(501.69)
Plus opening bank balances and cash on hand	8,865.23	9,366.92
Bank accounts and cash at the end of the financial year	10,065.05	8,865.23
Represented by:		
Cheque account(s)	449.78	474.42
Savings account(s)	3,615.27	8,390.81
Term deposit account(s)	6,000.00	0.00
Cash floats		0.00
Petty cash		0.00

Note

Statement of assets and liabilities

Significant assets

Description of significant assets	This year \$	Last year \$
Investments (e.g. shares, bonds, units in managed funds)	0.00	0.00
Amounts loaned to other organisations or persons	0.00	0.00

Significant liabilities

Description of significant liabilities	This year \$	Last year \$
Loans	0.00	0.00
Amounts borrowed from other organisations or persons	0.00	0.00
Money held on behalf of others	0.00	0.00

Notes

Basis of preparation

This performance report is prepared on a cash-basis in accordance with XRB's Tier 4 Simple Format Reporting Requirements. The charity is eligible to apply these requirements 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 GST

The entity is not registered for GST. All amounts recorded in this report are GST-inclusive.

Related-party transitions

Related-party relationship	Transactions	Value		Amount outstanding	
		This year	Last year	This year	Last year
Trustees and committee members	Regularly provided their time and skills to the oversight and operation of the trust at no charge	—	—	—	—
Close family members of the trustees and committee members	Occasionally helped out (e.g. at events and with IT advice) at no charge	—	—	—	—

Events after the balance date

No events after the balance date affect this report.

Approval

This performance report has been approved by those charged with governance.

Name Andrew Matheson

Position Trustee, Clan Matheson New Zealand

Date 7 July 2025

Signature



Name Blair Matheson

Position Trustee, Clan Matheson New Zealand

Date 7 July 2025

Signature



Name Graeme Matheson

Position Trustee, Clan Matheson New Zealand to 25 June 2025

Date 7 July 2025

Signature

