





On the 31st of May 2017 the Hugo Charitable Trust was launched by Maryanne, Mark and Alice in honour of Hugh Green to build on his philanthropic legacy for the future benefit of Aotearoa New Zealand and New Zealanders.

[Click here to watch a little of Hugh's story](#)



# Our Founder

Maryanne Green is the eldest daughter of Hugh Green and worked closely by his side for over 25 years.

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Like Hugh, Maryanne left school with few formal qualifications, however Hugh saw the qualities and the potential that would see Maryanne progress from managing his farming office, Kilmacrennan Livestock, through to being the Chief Executive of the Green & McCahill Group and later the Hugh Green Group for more than 15 years before retiring in 2012.

In 1998 Hugh and Maryanne established the Hugh Green Charitable Trust later to be renamed the Hugh Green Foundation. During the 13 years she spent as a founding trustee of the Hugh Green Charitable Trust, Maryanne made many contacts in the philanthropic community and developed a passion for what her dad would call “lending a helping hand – a hand up not a hand out”.

In 2011 Maryanne stepped aside from the Hugh Green Foundation but was delighted to reestablish her love of philanthropy when she founded the Hugo Charitable Trust in May 2017. Since Hugo was established Maryanne has been overwhelmed by the response she has received from the philanthropic community both in New Zealand and in Ireland.



# A Word From Our Chair

Back row: Kerry Ludlam, Mark Owens, Bruce Stewart QC, Kathryn Roberts, Stephen Hunter, Julia Hunter. Front row: Aoibheann Monaghan and Maryanne Green.

## Céad míle fáilte A hundred thousand welcomes Haere mai

Hi everyone and welcome to our first annual report since we launched the Hugo Charitable Trust on the 31st of May last year. It's been a crazy year for Hugo but I am really proud of the great team we have gathered around us and of the donations we have made so far. Our donations team led by Julia Hunter and Aoibheann Monaghan have researched numerous charitable causes and met a huge number of inspiring people working hard in our communities to make a positive social impact.

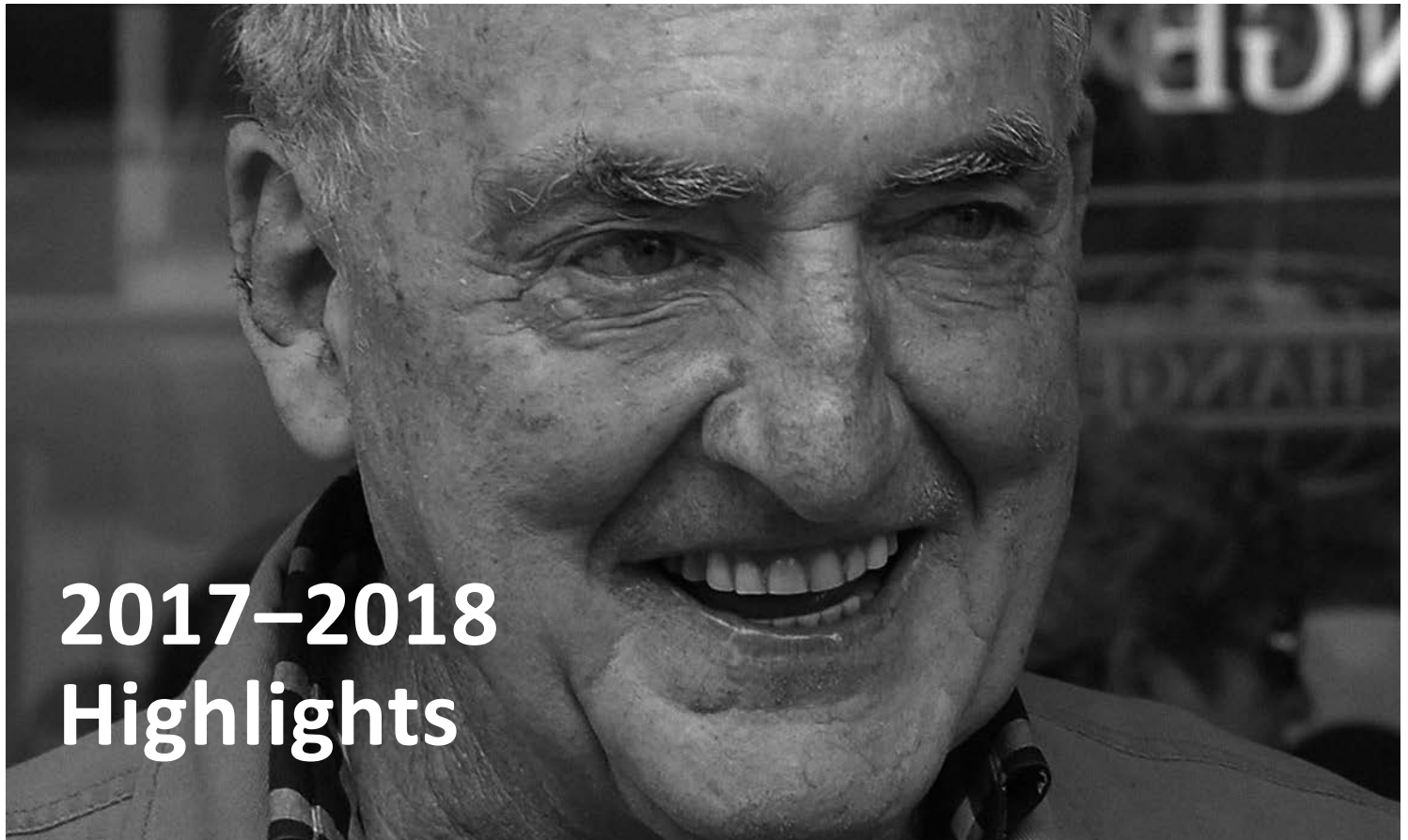
It would be fair to say that Maryanne set us an ambitious target for our first year of giving, but my fellow trustees and I are very happy having achieved our charitable goals for our first financial year.

For the financial year, Hugo's donations totalled \$3,007,125.49 given to over 70 great New Zealand charities and causes. I am pleased to be able to tell you that for the first two years all our costs and overheads are being covered by Maryanne Green and Alice Watson from distributions from the Hugh Green Family Trust of which the trustees are Maryanne Green, Alice Watson and myself, so every cent of the Hugo Charitable Trust is being used to support our charitable purposes.

From our founder Maryanne Green, Alice Watson, the trustees of the Hugo Charitable Trust – Mark Owens, Stephen Hunter, Kathryn Roberts and Bruce Stewart QC, our CFO Kerry Ludlam, and our donations team Julia and Aoibheann, we hope you enjoy reading our first annual report. We thank you for your continued support being a Friend of Hugo.

Mark Owens  
CHAIRMAN





## 2017-2018 Highlights

**\$250,000**

Given to 40 charities  
nominated by  
Friends of Hugo

**72 Charities**

Supported  
by the Hugo  
Charitable Trust

**\$1.5 million**

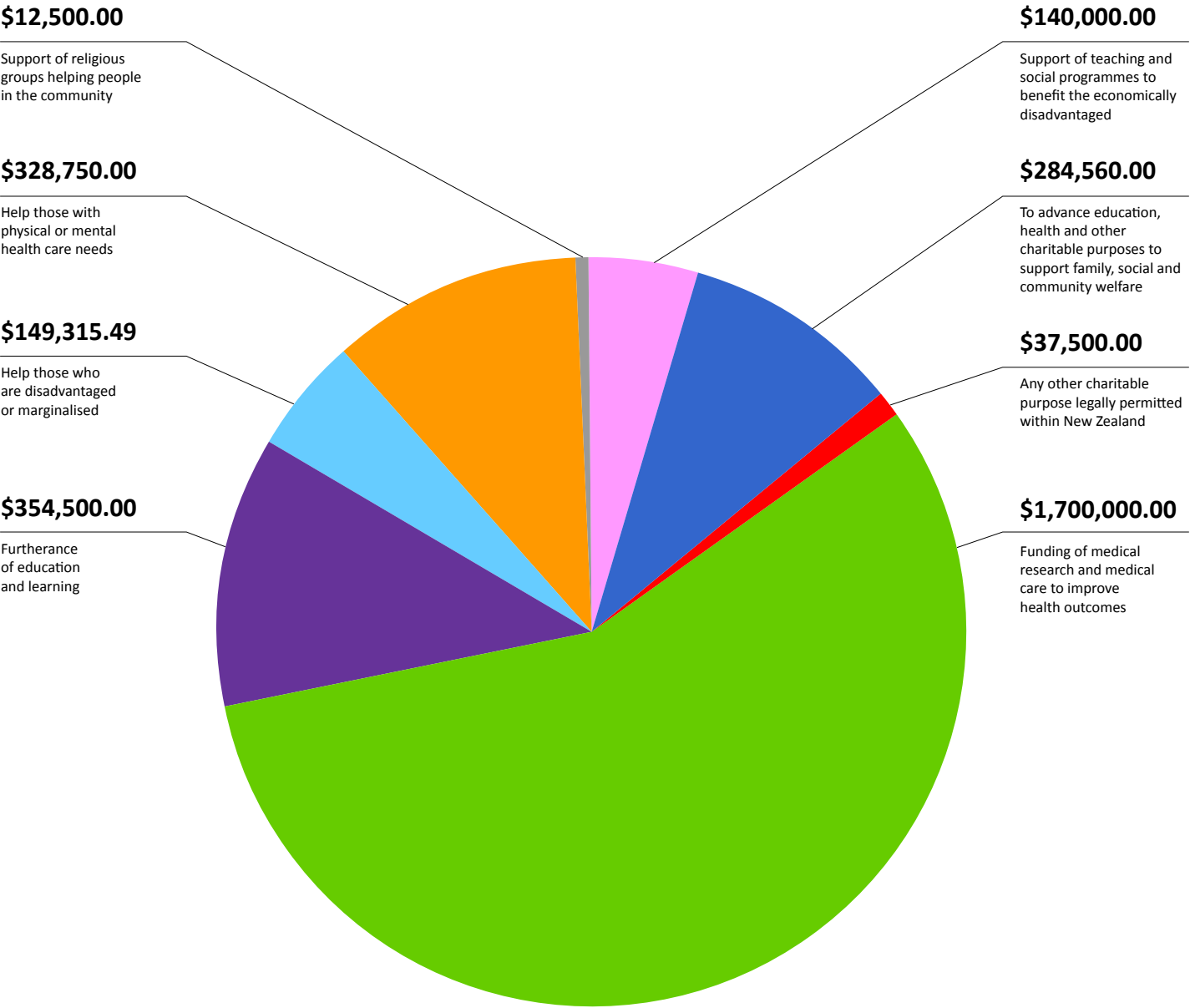
Donated to  
medical research

**\$3,007,125.49**

For the benefit of  
New Zealanders

We have made a great start in donating to worthy charities that meet our charitable purposes:

2017-18 Donations by Charitable Purpose



We have many more to come...

We would like to share with you some of the progress we've made so far fulfilling our charitable plans through donations to the following charities:



### Mana-ā-Riki / Kootuitui ki Papakura pilot programme – South Auckland

Hugo is proud to support this innovative pilot programme with a donation of \$200,000. The pilot was launched by the Middlemore Foundation to improve the health and education of 1,700 students at partner schools in Papakura, South Auckland.

This community led programme focuses on health, education and the home to help kids reach their potential. It offers “a sustainable hand-up out of the cycle of poverty” which fits with a number of the Hugo Charitable Trust’s own purposes.



Our donation has been used to pay the salary of Papakura High School’s Youth Worker, as part of that school’s enhanced health service. It has also contributed to the “Homes Strand”. This aspect of the pilot involves a wonderful group of local mothers (above) finding solutions to pressing issues - healthy homes, budgeting, and understanding their kids’ e-learning needs - and feeding those solutions back to their community.

### Sistema Aotearoa – South Auckland

Sistema Aotearoa works to bring about social change, community empowerment and personal growth for children from vulnerable communities through orchestral music making.

We are delighted to announce that Hugo has donated \$120,000 to Sistema Aotearoa. This sponsorship will fully fund the Music Director, Jess Hindin, through until March 2019.



The Hugo team has seen Jess and the kids in action - they are fantastic! We encourage others to find out more about Sistema Aotearoa and to look out for their upcoming performances.



### Sistema Waikato – Hamilton

Like its counterpart in Auckland above, Sistema Waikato uses orchestral music making to “increase student wellbeing, develop musicality, and strengthen youth leadership and community connectedness”. Children from five partner schools in Hamilton participate in violin, cello, flute, choir, percussion, and orchestral lessons.

Sistema Waikato will use Hugo’s \$15,000 donation to purchase new instruments and provide professional development for its staff and volunteers. Hugo’s donation means that Sistema Waikato will now be able to introduce viola, clarinet and double bass into its programme.







### Te Kura o Hato Hohepa te Kamura (St Joseph the Carpenter School) – Northland

The Hugo team had the privilege of visiting the children of Hato Hohepa te Kamura primary school in Waitaruke just north of Kaeo on 4 September 2017. The trip was arranged to renew a connection with Sister Isabelle Harding who had taught at the school and served as Board of Trustees Chairwoman until her retirement a few years ago.



Hato Hohepa is a small decile 1 Catholic Māori immersion primary school brimming with enthusiastic tamariki. These children are learning Kapa Haka and Music in addition to other core subjects.



Hato Hohepa will use the \$65,000 Hugo donation for musical instruments and to upgrade the school playground. The school will incorporate a larger sandpit and provide sunshades to protect the kids from the intense Northland sun.

"I've often overheard very rich learning conversations between children in their playtime in the sandpit. In addition, many times throughout the year there are tangi and other events held at the neighbouring marae and the playground is well used on those occasions. So it really will be a community facility." (Helen West, former principal)



[Click here](#) to see how excited the kids were about their book bags and treats inside!





### Abilities Group - North Shore

Abilities Group is an Incorporated Society which provides employment opportunities for people with disabilities in New Zealand. Abilities Group operates a recycling service and employs 140 people. It is known for its sustainable recycling of old electronic and electrical equipment. With a recent Hugo donation of \$100,000, Abilities Group will be able to purchase a new truck to help with its recycling work with soft plastics and polystyrene. Hugo is pleased to support Abilities' mission of "enriching the lives of people with disability through meaningful work".

### Teach First NZ - Auckland, Northland (St Paul's College Ponsonby)

Teach First is a teaching and leadership programme that aims to tackle educational inequality in Aotearoa by developing top graduates into educators who go on to teach in low decile schools.

Part of Hugo's \$50,000 donation has been tagged to a scholarship recipient, Rewa Worley, who teaches Te Reo Māori and Science at St Paul's College, a decile 2 school in Ponsonby.



"I feel the dual emphasis on both education and leadership within the field is a necessary aspect of creating change within society."

Rewa Worley

Rewa is part of Teach First NZ's 2017 cohort of 27 participants who collectively are teaching 2,500 children from low-income communities across Auckland and Northland.



## Auckland City Mission

With Hugo's office located in the centre of Auckland, we often see members of our Auckland community who are in desperate need of food and shelter. The Auckland City Mission is one of the few remaining social service providers in Auckland's inner city working intensively with this vulnerable group.

Local artist John Crawford spent time with the homeless in central Auckland taking an interest in their lives and building a rapport with each individual. John's work was exhibited at the Gow Langsford Gallery in October 2017. All proceeds from the sale of John's art work were donated to the Auckland City Mission. John's portraits of Rua and Victor below are now proudly displayed at the Hugo office. Victor is a good friend of the Hugo team and has visited our office for a cup of tea and a chat and he was delighted to see his portrait displayed.



"Victor (left) stands out as being different from the other many homeless....and in a way distinguished looking. He told me he is 58 years old. Rua (right) has lived on the street for over 10 years. He survives on scraps from city rubbish bins. I asked also where he was originally from. "Nowhere in particular".

(John Crawford)

## Thomas Fyers – Onewhero

Thomas (right) grew up in Onewhero with the desire to be a farmer. He was making progress towards this goal when in 2015 he suffered a severe brain bleed at the age of 16 years old. This incident left Thomas paralysed, but his brain still functioning well.

The Hugo Charitable Trust donated \$10,000 for an off road farm/mobility scooter to allow Thomas to work on his project of breeding sheep and cattle while continuing his rehabilitation.



## The Hugo team volunteer day at Auckland City Mission – Christmas 2017

The Hugo Charitable Trust's donation of \$60,000 is supporting the Mission's Homeless Outreach and Support Service team with a new mental health worker.



"This makes an immense difference to the team as it enables them to respond more effectively to [the issues that] the homeless people we work with face, which previously has been a significant challenge for them."

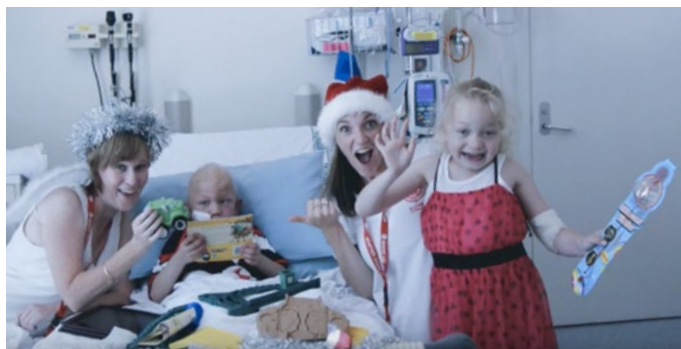
(Auckland City Mission Newsletter, March-April 2018)





## Radio Lollipop – Nationwide

The Radio Lollipop volunteers provide an invaluable service to the children in hospital through play, care and entertainment. “Radio Lollipop is very helpful clinically - a calm child recovers better.” (Madeline Ismach)



The Hugo donation of \$3,000 was used to buy gifts for the children in hospital on Christmas Day 2017. These gifts were distributed at Starship hospital as well as many other hospitals around New Zealand.

## The Argo Trust – Wellington

The staff at the Argo Trust are committed to ensuring their residents, who have severe intellectual and physical disabilities, live the best lives possible.

The Hugo donation of \$20,000 to the Argo Trust will be used to purchase new chairs for the residents and will also contribute towards a new transport van.



Hayden (pictured above) has lived at the Argo House for over 3 years.

## Adventurous Hugo – Wellington

Hugo is a 3-year-old boy who was born at 33 weeks with a type of Cerebral Palsy called Spastic Quadriplegia. This has meant that tasks such as walking, that are often taken for granted, are very difficult for Hugo. The Hugo Charitable Trust was very touched to hear about Hugo's story and donated \$25,000 to help with Hugo's everyday care and needs.

<https://givealittle.co.nz/cause/helpforhugo>



## Reuben Davis – Wellington

Reuben is an 11 year old boy who found out he has leukemia two days after Christmas 2017. Reuben's parents are originally from County Armagh, Ireland. They emigrated to New Zealand along with Reuben and their three other children three years ago. The Hugo Charitable Trust donated \$10,000 to help support Reuben's family while he undergoes treatment for leukemia.

Reuben is going through a tough time at the moment after undergoing a platelet transfusion following an infection. Reuben and his family are in our thoughts at this challenging time. Go n-éirí an t-ádh leat Reuben.



<https://givealittle.co.nz/cause/little-reuben-is-fighting-leukaemia>

## Who Did You Help Today Trust (WDYHT) – Nationwide

Hugo's donation of \$100,000 will help WDYHT continue to grow the following community projects in 2018:

### Homework Help Club

This project links workplaces with low decile primary schools to support students' learning at a weekly homework club. Students' education and job possibilities are broadened by the interaction with different role models. In turn, volunteers learn more about their communities and the wonderful potential of the young people within those communities.



### Mothers Project

What started as a pilot programme at Auckland women's prison in Wiri, the Mothers Project has now expanded to every women's prison in New Zealand. Female lawyer volunteers regularly visit the women's prisons and sit down and chat with imprisoned mothers free of charge.



They focus on helping the mothers maintain or rebuild relationships with their children, or help with other issues involving the children's safety and care. To date, more than 300 imprisoned mothers out of a total of about 800 nationwide have been helped, one-on-one, by a Mothers Project volunteer.

Iva Rosic (right) who is a Hugo Friend brought this great cause to our attention. Iva is a partner at law firm Gilbert Walker and is also a Mother's Project volunteer.



"As a volunteer you can make a real difference by connecting families and children to mothers who are in prison. It matters to a child or a family member caring for them that mum is asking after them, that she is thinking about them and that she loves them. It also matters to the mothers, who are often anxious when they first come to see us, but over time become more hopeful and positive. Volunteering for the Mothers Project has been a hugely rewarding experience, and has given me a new perspective on the challenging lives of some women and children in our country." (Iva Rosic)

## Ohana Young Parents Trust - West Auckland

The team at Ohana Young Parents Trust impressed Hugo with the great work they are doing in their West Auckland community. Ohana helps young mothers learn to care and nurture their babies and provides those young mothers with the necessary support to continue their education.



Hugo's donation of \$3,060 will pay for the cost of the first aid courses delivered by St John in Ohana's programme in 2018.



### Dilworth School – Auckland

Bruce Stewart QC Scholarships to the Royal School of Dungannon in Ireland gifted by the Hugo Charitable Trust:

Dilworth School is a boarding school in Auckland which has been providing life changing education scholarships “for boys from good families with limited means” for well over a hundred years.

Hugo is delighted to contribute to the transformative effect of a Dilworth education by giving three Dilworth leavers the opportunity to work as resident tutors for a year at the Royal School of Dungannon in 2019. These scholarships totalling \$65,000 have been awarded in the name of one of Hugo’s trustees, Bruce Stewart QC, who is a Dilworth old-boy.



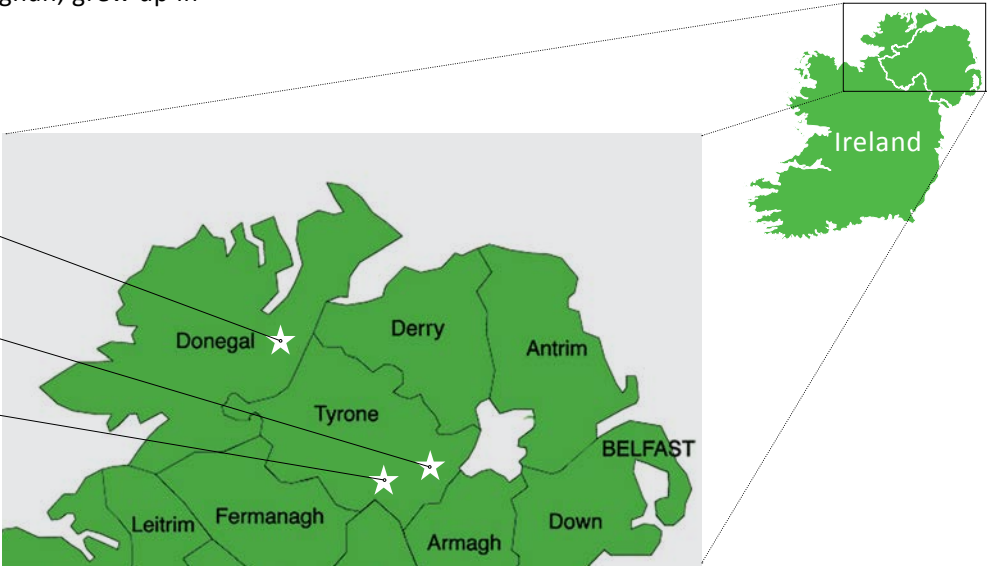
Left to right: Harrison Dudley-Rode (recipient), Stephen Hunter (Hugo Trustee), Bruce Stewart (Hugo Trustee), Nathan Su’a (recipient), Bradley Egglestone (recipient), Mark Owens (Hugo Chairman).

Dilworth maintains a special connection with the Royal School of Dungannon in County Tyrone, Ireland, as it is the alma mater of the school’s founder, James Dilworth. Hugo also has a special link with County Tyrone, as our Donations Officer, Aoibheann Monaghan, grew up in Augher, not far from Dungannon.

Raphoe – Hugh’s home town

Royal School of Dungannon

Augher – where Aoibheann grew up



### The Moko Foundation – Northland

The Moko Foundation was established by Dr Lance O’Sullivan to support and empower communities in Northland with a focus on vulnerable children and young people. Hugo’s \$53,500 donation was made to increase the number of participants in the Foundation’s Hawea Vercoe Leadership Programme in 2018. This mentoring programme aims to create a generation of Māori leaders who can lead cultural, economic, health and development for the Northland region.



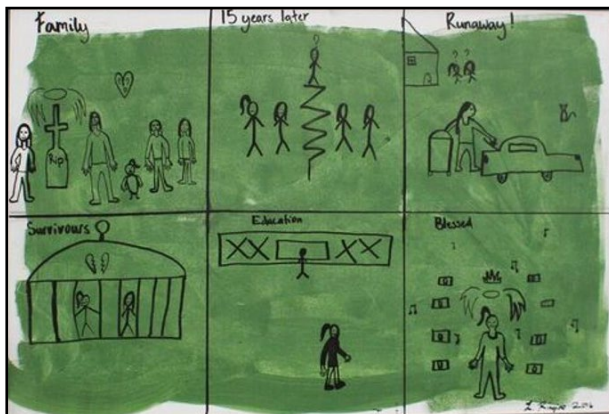
The Moko Foundation’s first Hawea Vercoe Leadership scholar was Ezekiel Raui (below). Ezekiel developed a suicide prevention pilot programme called Tū Kotahi while still at high school. He is now the youngest member of The Moko Foundation’s Board of Trustees.



## Kākano Youth Art Collective – West Auckland

The Hugo Charitable Trust is excited about this visual arts initiative for vulnerable young people in West Auckland run by Mandy Patmore at the Corban Estate Art Centre. Participants of Kākano develop their art practice in painting, printmaking, carving, photography, sculpture and murals and public art. They work in a studio three times a week with over 20 on-site artists. This environment provides a sense of purpose, access to role models and a sense of community.

A Hugo donation of \$20,000 will help Kākano to hire a part-time youth/social worker to help support the programme's participants. This donation is thanks to our Hugo Friends at Gilbert Walker who researched this charity and put forward a donation proposal to Hugo.



Young Artist: Leila, 16 years old, has participated in the Kākano programme for over three years.

## The UpsideDowns Education Trust – Nationwide

UpsideDowns is a small charity making a huge difference. UpsideDowns helps fund life changing speech language therapy for kids with Down syndrome all over New Zealand.



Hugo's donation of \$45,000 will be used to target low-income families who need UpsideDowns' support. As a first step towards achieving this goal, UpsideDowns has partnered with Raukauri Music Therapy Centre to set up a free speech and music therapy group called "Tuneln". Tuneln will be based at the Clover Park Community House in Manukau, South Auckland.



One of UpsideDowns newest members, Oscar Smyth.

Kieran Barker, is also a member of UpsideDowns.

## First Foundation – Nationwide

First Foundation's mission is to "assist academically talented New Zealand students worthy of support to achieve their potential through tertiary education, and to prepare them to positively influence and benefit their communities." Hugo's donation of \$50,000 will help the First Foundation facilitate its Student Success Programme. Under this programme, the First Foundation provides student workshops, mentor training, mental health support, family support and regular check-ins to help its scholarship students achieve success with their tertiary studies.



This donation is thanks to our Hugo Friends at Gilbert Walker who researched this charity and put forward a donation proposal to Hugo.





Maryanne worked closely with Hugh for over 25 years where she developed a deep understanding of Hugh's philanthropic priorities and wishes. The following donations reflect Hugh's long history of support for New Zealand based medical research. Such research has the potential to improve the lives of all New Zealanders.

### Liggins Institute, University of Auckland

A donation was made to the Liggins Institute to support a research cluster comprising of an emerging researcher, two PhD students and research costs to investigate premature birth. Babies born too small or too early are at greater risk of developing diseases such as obesity and type 2 diabetes in later life. Led by Associate Professor Dr Katie Groom, researchers supported by the Hugo donation will focus on interventions that could help growth restricted babies to grow better in the womb and reduce the risk of premature delivery.

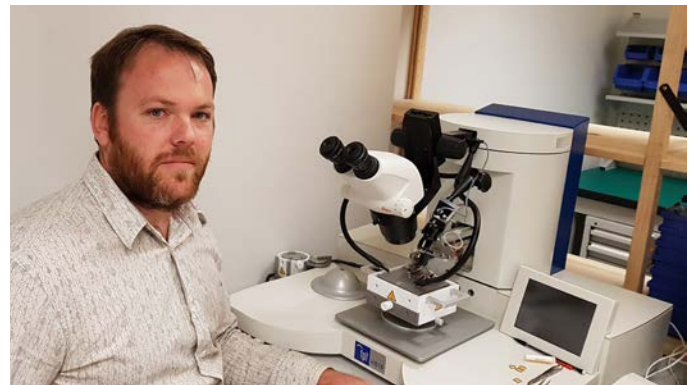
“Dr Katie Groom is a world leader in the area of diagnosis and therapy for growth-restricted babies.”



We were delighted to have Hugh's brother John Green and his wife Ann (right) attend the Hugo Charitable Trust recognition event in November 2017 for the Liggins Institute and Auckland Bioengineering Institute.

### Auckland Bioengineering Institute (ABI), University of Auckland

The donation to the ABI will fund a similar research cluster to the one at the Liggins Institute. The team at ABI, led by Dr Daniel McCormick, will conduct research into optogenetics – the use of light to target neurons in conditions where stimulation is required.



Dr McCormick's team will study the use of custom-made wireless LED devices that can be implanted inside the human body to measure cellular responses to light. This new technology could help treat conditions such as Parkinson's disease.



## Middlemore Foundation - Urology Department, Manukau Super Clinic – South Auckland

In March 2018 the Hugo Charitable Trust donated \$200,000 to the Middlemore Foundation. This donation will be used to purchase an Artemis MRI Guided Prostate Biopsy System for Manukau Super Clinic.

The Artemis system allows less invasive and more accurate testing for prostate cancer. In particular, it aims for early diagnosis in men with a high suspicion of prostate cancer. The Artemis System will reduce the time patients spend in the hospital which in turn should lower the demands on medical staff. The Hugo Charitable Trust hopes that the Artemis system will help doctors at the Manukau Super Clinic make life-saving diagnoses for prostate cancer patients.



## Auckland Medical Research Foundation (AMRF)

A special event was held at the AMRF Medical Sciences Learning Centre in December last year. This was to recognise our donation to fund ongoing pancreatic-related research. Professor John Windsor gave a presentation on the study and management of pancreatic diseases and the “Brian Owens Respiratory Node” was unveiled. This name was chosen to honour Mark Owen’s father who died of pancreatic cancer at a young age. Members of the Owens family attended the event.

The Hugo Charitable Trust hopes that this donation will make a significant difference to the size and scope of research into pancreatic cancer, a difficult to detect disease with a very low survival rate.



The Hugo team has been very impressed with all the charities we have donated to over the last year. These charities are dedicated to making a real difference to the communities they support. We have been humbled by their courage and tenacity and that of the individuals

we have helped. These individuals and charitable groups are all part of our wider Aotearoa community. We strongly encourage other New Zealanders to read their stories and support them. They would all greatly appreciate a donation of any size – no amount is too big or too small.

You will find links to the websites of all the charities Hugo has donated to on page 38 of this report.

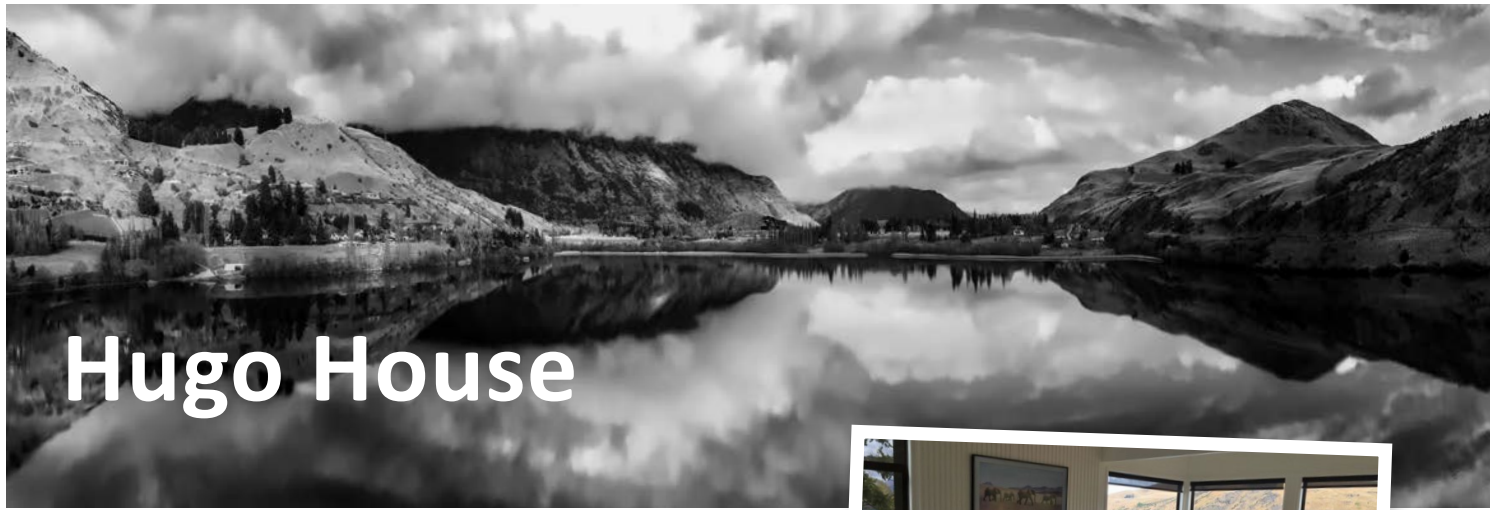


Charity		Purpose		Donation
Abilities Group		Truck		\$ 100,000.00
Adventurous Hugo		Cerebral Palsy		\$ 25,000.00
Argo Trust		Chairs for residents with disabilities		\$ 20,000.00
Auckland Bioengineering Institute		Research Cluster		\$ 500,000.00
Auckland City Mission		Homeless Outreach Worker and Coats		\$ 66,852.60
Auckland Medical Research Foundation		Pancreas-related research		\$ 500,000.00
Auckland Rescue Helicopter Trust		2 x Hugo Friend nominations		\$ 7,500.00
Barnardos		Hugo Friend nomination		\$ 5,000.00
Bernard Goldwater Jewish Education Trust		Hugo Friend nomination		\$ 5,000.00
Cancer Society		2 x Hugo Friend nominations		\$ 10,000.00
Christians Against Poverty (CAP)		Hugo Friend nomination		\$ 5,000.00
Cystic Fibrosis NZ		Hugo Friend nomination		\$ 5,000.00
De Paul House (St Vincent De Paul)		Hugo Friend nomination		\$ 2,500.00
Dilworth School		3 x scholarships to Ireland		\$ 65,000.00
Eat My Lunch		Hugo Friend nomination		\$ 5,000.00
First Foundation		Student Success Programme		\$ 50,000.00
Foster Hope Charitable Trust		Hugo Friend nomination		\$ 5,000.00
Garden to Table Trust		2 x Hugo Friend nominations		\$ 7,500.00
Heart Kids NZ		Hugo Friend nomination		\$ 5,000.00
Home and Family Counselling		Hugo Friend nomination		\$ 6,500.00
Inzone Education Foundation		Hugo Friend nomination		\$ 5,000.00
Jigsaw Central Lakes		Hugo Friend nomination		\$ 5,000.00
Kākano Youth Arts Collective		Visual Arts initiative		\$ 20,000.00
Kids with Arthritis NZ		Arthritis		\$ 10,000.00
Kidscan Charitable Trust		3 x Hugo Friend nominations		\$ 15,000.00
Koru Care Charitable Trust		Hugo Friend nomination		\$ 5,000.00

Charity		Purpose		Donation
Lifeline Aotearoa		2 x Hugo Friend nominations	\$	7,500.00
Liggins Institute		Research cluster	\$	500,000.00
Lions Transplant House		Hugo Friend nomination	\$	5,000.00
Middlemore Foundation Mana-ā-Riki		Health Service & Homes Strand (Papakura)	\$	200,000.00
McCahon House Trust		Hugo Friend nomination	\$	5,000.00
Mercy Hospice		Hugo Friend nomination	\$	5,000.00
Muscular Dystrophy Association of NZ		Duke of Edinburgh Award (Lance O'Sullivan)	\$	750.00
National Contemporary Art Award		Hugo Friend nomination	\$	5,000.00
Nelson Tasman Hospice		Hugo Friend nomination	\$	5,000.00
NZ Catholic Women's League		Hugo Friend nomination	\$	5,000.00
NZ Paramedic Education & Research		Hugo Friend nomination	\$	5,000.00
Ngā Tangata Microfinance Trust		Hugo Friend nomination	\$	5,000.00
North Shore Hospice Trust		Hugo Friend nomination	\$	5,000.00
NZ Breast Cancer Foundation		Hugo Friend nomination	\$	5,000.00
Ohana Young Parent Charitable Trust		St John First Aid	\$	3,060.00
Ōtautahi Creative Spaces		Hugo Friend nomination	\$	5,000.00
Paw Justice		Hugo Friend nomination	\$	5,000.00
Paws 4 Life Charitable Trust		Hugo Friend nomination	\$	5,000.00
Pillars (Auckland)		Hugo Friend nomination	\$	5,000.00
Pohutukawa Trust NZ		Hugo Friend nomination	\$	5,000.00
Project Jonah		Hugo Friend nomination	\$	5,000.00
Project Moroto		Hugo Friend nomination	\$	5,000.00
Radio Lollipop NZ		Christmas gifts for 130 children in hospital	\$	3,000.00
Rainbow Youth		Hugo Friend nomination	\$	5,000.00
Recreate NZ		Hugo Friend nomination	\$	5,000.00
Reuben Davis		Leukemia	\$	10,000.00



Charity 	Purpose 	Donation
Royal NZ Coastguard	Hugo Friend nomination	\$ 2,500.00
Sistema Aotearoa	Music Director's Salary	\$ 120,000.00
Sistema Waikato	Musical instruments and professional development	\$ 15,000.00
Sistema Whangarei	Hugo Friend nomination	\$ 5,000.00
SPCA - Auckland	3 x Hugo Friend nominations	\$ 10,000.00
SPCA - Waiheke	Hugo Friend nomination	\$ 5,000.00
St Dominic's Catholic Primary	School facilities	\$ 2,000.00
St John's Ambulance	Hugo Friend nomination	\$ 5,000.00
St Vincent de Paul Otahuhu	Hugo Friend nomination	\$ 2,500.00
Stroke Foundation NZ	Hugo Friend nomination	\$ 5,000.00
Te Kura o Hato Hohepa te Kamura (St Joseph the Carpenter School)	New playground and musical instruments	\$ 65,000.00
Te Puawaitanga ki Ōtautahi Charitable Trust	Hugo Friend nomination	\$ 5,000.00
Teach First NZ	Teacher's scholarship and training	\$ 50,000.00
The Lifewise Trust	2017 Big Sleep Out Fundraiser	\$ 23,962.89
The Moko Foundation	Hawea Vercoe Leadership Programme	\$ 53,500.00
The UpsideDowns Education Trust	Speech Therapy	\$ 45,000.00
Thomas Fyers	Mobility Off-Road Farm Scooter	\$ 10,000.00
Middlemore Foundation, Manukau Super Clinic	MRI Guided Prostate Biopsy System	\$ 200,000.00
Variety NZ	2 x Hugo Friend nominations	\$ 7,500.00
Who Did You Help Today Trust	Mothers Project & the Homework Help Club	\$ 100,000.00
<b>Total</b>		<b>\$ 3,007,125.49</b>



### Hugo House – Central Otago

The Hugo Team is very excited to introduce the Hugo House situated on picturesque Lake Hayes in Arrowtown. The Hugo House has been specially converted to accommodate wheelchairs and other special needs. There is also a Hugo van (pictured below), which is available for use.

The Hugo House was set up by Mark, Maryanne and Alice to make it possible for people to have a holiday when they would find it difficult to do so otherwise. We also welcome friends of Hugo and the families and volunteers of the charities we support to use the house.

The Hugo House works closely with the Hugo Charitable Trust and many of our referrals come from there.

In January this year, we had some lovely families with connections to the Hugo Charitable Trust stay at the Hugo House. Following their visits, these families kindly shared with us what their stay at the Hugo House meant to them:

“What a special, special family retreat we had. Thank you so much Hugo for leaving such a special legacy.”

Kids with Arthritis NZ



“We are a close family, so to be able to share the different experiences has had a strengthening effect on our bond in our whānau. A trip we will never forget.”

Sistema Aotearoa







# Ireland Donations

The Hugo Ireland Donations were established by Maryanne, Mark and Alice as a separate source of funds to the Hugo Charitable Trust. The former is specifically for charitable giving in Ireland. However, the Hugo Ireland Donations

are managed by the Hugo team in recognition of the Irish/New Zealand connections of the Hugo Charitable Trust. The Hugo Ireland Donations and the Trust are therefore closely aligned and hold similar values.

**“120% Irish if I were allowed.”**

HUGH GREEN

In July 2018, the Hugo team will travel to Ireland to visit Hugh's home town of Raphoe. This trip will be at no cost to the Hugo Charitable Trust. In Ireland, the Hugo

team will meet some charities that Hugh has donated to in the

past, as well as new charities that are making a valuable social impact. The following two charities are just some of the charities on our list to visit:



## Little Angels School – Letterkenny, County Donegal

This school is particularly special as Hugh had a long association with the Little Angels School. In particular, Hugh donated a playground designed for children with disabilities (above). We are delighted to continue this relationship by donating €11,000 from the Hugo Ireland Donations. This donation will be used to purchase two interactive floor projectors. These projectors detect body movements while supporting recognition ability and cognitive response. This aids activities of children with special needs and increases their experience of interpersonal interactions.

engaged critically with global issues, and taking actions for a better world from a place of common humanity, peace, resilience, personal and social wellbeing



## Children in Crossfire – County Derry

Teachers in this Development and Learning (TIDAL) education programme in County Derry work with children to facilitate integration of Protestants and Catholics by teaching compassion and reconciliation. The Dalai Lama is the Patron of this charity.

This charity was founded by Richard Moore who was blinded in 1972 at the age of ten by a rubber bullet fired by a British soldier during the Troubles in Ireland. Richard has described his journey as follows: “I learned to see life in a different way, I may have lost my sight, but I have my vision”. The Hugo team look forward to meeting Richard and his team in Derry in July 2018.



Financial Statements  
for the year ended 31 March 2018

[www.hugocharitabletrust.nz](http://www.hugocharitabletrust.nz)



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# Approval of Financial Statements

Financial Statements  
for the year ended 31 March 2018

The Trustees are pleased to present the Financial Statements of Hugo Charitable Trust, as at and for the year ended 31 March 2018.

  
\_\_\_\_\_  
Trustee

26 April 2018  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Trustee

26 April 2018  
\_\_\_\_\_  
Date



Directory

Nature of entity	Charitable Trust
Purpose	<p>Maryanne Green as the Settlor established the Hugo Charitable Trust ("Hugo") to continue the legacy of helping others started by her father, Hugh Green. Hugh Green, born in 1931 in County Donegal in Ireland, was the fifth of eight children. Hugh endured great hardship through his early life before moving to New Zealand as a young man where he worked hard and lived by strong Catholic values which he encouraged his children to follow. As he went on to earn business successes he set about establishing a pattern of philanthropic giving to those less fortunate than himself. Hugh's eldest daughter, Maryanne Green, established this Trust in his name to continue his generous giving and in his memory.</p>



"My travel documents - note I had to "adjust" my age to be eligible"

Caption and image from:

Green, H. (2011). *Hugh Green: The Story of an Irish Emigrant Who Never Left Home*

## Directory (continued)

<b>Purpose (continued)</b>	<p>Hugo is established for the following charitable purposes:</p> <ul style="list-style-type: none"> <li>(a) the relief of poverty;</li> <li>(b) to advance education, health and other charitable purposes to support family, social and community welfare;</li> <li>(c) the care, support and assistance of those with physical or mental health care needs;</li> <li>(d) the support of religious groups which provide support and help to people in the community, particularly but not limited to Catholic groups such as (by way of example only) the Society of St Vincent de Paul in New Zealand, the Hospice and St Patricks Cathedral;</li> <li>(e) the care, support and assistance of the disadvantaged or marginalised;</li> <li>(f) the furtherance of education and learning;</li> <li>(g) the support of teaching and social programmes, to benefit the economically disadvantaged, including music programmes having regard to the opportunities music offers to build self-esteem and encourage achievement;</li> <li>(h) the funding of medical research and medical care to improve health outcomes;</li> <li>(i) the support of charitable organisations that further the above purposes; and</li> <li>(j) any other purposes within New Zealand which are charitable according to the law of New Zealand.</li> </ul>
<b>Settlor &amp; Founder</b>	Maryanne Green
<b>Trustees</b>	Mark Owens Kathryn Roberts Robert ("Bruce") Stewart Stephen Hunter
<b>Date of establishment</b>	20 April 2017
<b>Date of registration</b>	4 May 2017
<b>Registration number</b>	CC54425
<b>Location of business</b>	Tracy Island Level 3, General Buildings 29-33 Shortland Street Auckland 1143
<b>Website</b>	<a href="http://www.hugocharitabletrust.nz">www.hugocharitabletrust.nz</a>
<b>Auditors</b>	KPMG 18 Viaduct Harbour Avenue Auckland



# Statement of Comprehensive Revenue and Expense

for the year ended 31 March 2018  
in New Zealand Dollars

	Note	2018 \$
<b>Revenue</b>		
Income distributions from the Hugh Green Family Trust	2	1,250,000
- The Trustees are Maryanne Green, Mark Owens and Alice Watson		
Interest received		2,017,105
<b>Total Revenue</b>		<b>3,267,105</b>
<b>Expenses</b>		
Donations and Grant Expenses	3	(3,007,125)
<b>Total Expenses</b>		<b>(3,007,125)</b>
<b>Operating Surplus for the Year</b>		<b>259,980</b>
<b>Other Revenue</b>		
Distribution received from the Hugh Green Property Trust		75,000,000
<b>Total Other Revenue</b>		<b>75,000,000</b>
<b>Net Surplus for the Year</b>		<b>75,259,980</b>
<b>Other Comprehensive Revenue and Expense</b>		<b>-</b>
<b>Total Comprehensive Revenue and Expense for the Year</b>		<b>75,259,980</b>

# Statement of Financial Position

as at 31 March 2018  
in New Zealand Dollars

	Note	2018 \$
<b>Current Assets</b>		
Cash and Cash Equivalents		40,006
Receivables		20,074
Investment	5	75,200,000
<b>Total Current Assets</b>		<b>75,260,080</b>
<b>Total Assets</b>		<b>75,260,080</b>
<b>Equity</b>		
Accumulated Comprehensive Revenue and Expense		75,259,980
Trust Capital		100
<b>Total Equity</b>		<b>75,260,080</b>

# Statement of Changes in Trust Funds

for the year ended 31 March 2018  
*in New Zealand Dollars*

	Trust Capital	Accumulated Comprehensive Revenue and Expense	Total Equity
Opening balance at 20 April 2017	-	-	-
Surplus for the Year	-	75,259,980	75,259,980
Settlement sum	100	-	100
<b>Closing balance at 31 March 2018</b>	<b>100</b>	<b>75,259,980</b>	<b>75,260,080</b>



# Statement of Cash Flows

for the year ended 31 March 2018  
in New Zealand Dollars

	2018 \$
<b>Cash flows from operating activities</b>	
Distributions received	76,250,000
Donations made	(3,007,125)
Interest received	1,997,031
<b>Net cash flows from/(used in) operating activities</b>	<b>75,239,906</b>
<b>Cash flows from investing activities</b>	
Purchase of Investments	(75,200,000)
<b>Net cash flows from/(used in) investing activities</b>	<b>(75,200,000)</b>
<b>Cash flows from financing activities</b>	
Capital contribution	100
<b>Net cash flows from/(used to) financing activities</b>	<b>100</b>
<b>Net increase in cash held</b>	<b>40,006</b>
Opening Cash and Cash Equivalents at beginning of the year	-
<b>Closing Cash and Cash Equivalents at the end of the year</b>	<b>40,006</b>
<b>Made up of:</b>	
Bank Balances	40,006
<b>Total Cash and Cash Equivalents</b>	<b>40,006</b>

# Notes to the Financial Statements

## 1 General Overview

### a Reporting Entity

The financial statements presented are those for the Hugo Charitable Trust ("Hugo"). Hugo is established and domiciled in New Zealand, and is a registered charity under the Charities Act 2005.

The purpose of Hugo is to continue the legacy of helping others started by Hugh Green.

The financial statements for Hugo are for the year ended 31 March 2018. The financial statements were authorised for issue by the Trustees.

### b Basis of Preparation

The financial statements have been prepared in accordance with New Zealand Generally Accepted Accounting Practice ("NZ GAAP"). For the purposes of financial reporting they comply with PBE Accounting Standards Not-For-Profit and Tier 2 reduced disclosure concessions have been applied. As a registered charity, Hugo is required to prepare financial statements in accordance with NZ GAAP as specified in XRB A1.

Hugo has elected to report in accordance with PBE Accounting Standards Not-For-Profit Tier 2 on the basis that it does not have public accountability and has total annual expenses of less than \$30 million.

The financial statements are presented in New Zealand dollars (NZ\$) which is Hugo's functional currency, and have been prepared on an accrual and historical cost basis.

The statement of cash flows has been prepared using the direct method.

Hugo was incorporated on 20 April 2017. As such, this is the first year Hugo has prepared financial statements, and no comparative information is disclosed.

### c Use of Estimates and Judgements

The preparation of the financial statements in conformity with PBE Accounting Standards Tier 2 requires management to make judgements, estimates and assumptions that affect the application of accounting policies and the reported amounts of assets, liabilities, income and

There are no significant estimates used in the preparation of the financial statements.

### d Taxes

Hugo is a registered charity under the Charities Act 2005 and has an income tax exemption on the grounds of charitable purpose under Section CW41 of the Income Tax Act 2007. Hugo is not registered for GST purposes and the financial statements are prepared on a GST inclusive basis.

### e Cash and Cash Equivalents

Cash and cash equivalents comprise of cash at bank and term deposits with a maturity date of less than 90 days.

# Notes to the Financial Statements (continued)

## f Receivables

Non-trade receivables from exchange transactions comprise of accrued interest on term deposits and bank accounts.

## g Revenue

### i Distributions received

Distributions received are recognised on receipt or when the economic flow can be reliably estimated as revenue in the statement of comprehensive revenue and expenses.

### ii Interest income

Interest income is earned on term investments. Interest income is recognised in the statement of comprehensive revenue and expense as it is earned. Interest income is accrued using the effective interest rate method. The effective interest rate exactly discounts estimated future cash receipts through the expected life of the financial asset to that asset's net carrying amount. The method applies this rate to the principal outstanding to determine interest revenue each period.

## 2 Related Parties

Key management personnel include the settlor and founder Maryanne Green and the four Trustees: Mark Owens, Kathryn Roberts, Robert Stewart and Stephen Hunter, who do not receive any remuneration from the Hugo Charitable Trust in the current year.

Income distribution of \$1,250,000 recognised in the Statement of Comprehensive Revenue and Expense is a distribution received from the Hugh Green Family Trust. The Trustees of the Hugh Green Family Trust are Maryanne Green, Mark Owens and Alice Watson.

The Hugo Charitable Trust is also very grateful for the external funding of operational expenses by Maryanne Green and Alice Watson from the distributions from the Hugh Green Family Trust. The Trustees of the Hugh Green Family Trust are Maryanne Green, Mark Owens and Alice Watson.

There are no related party balances owing at balance date.

## 3 Donations and Grant Expenses

Donations and grants are recognised as expenses once the donation or grant is approved by the Trustees of the Hugo Charitable Trust and committed to by both parties. These have been approved by the Trustees up until balance date. Donations and grants approved from the current year's net surplus have been recognised as an expense in the statement of comprehensive revenue and expense.

The donations paid during the year total \$3,007,125 and were made to the following organisations:

	2018 \$
Abilities Group	100,000
Adventurous Hugo	25,000
Argo Trust	20,000
Auckland Bioengineering Institute	500,000
Auckland City Mission	66,853
Auckland Medical Research Foundation	500,000
Auckland Rescue Helicopter Trust	7,500
Barnardos	5,000
Bernard Goldwater Jewish Education Trust Board	5,000



# Notes to the Financial Statements (continued)

## 3 Donations and Grant Expenses (continued)

Cancer Society	10,000
Christians Against Poverty (CAP)	5,000
Cystic Fibrosis NZ	5,000
De Paul House	2,500
Dilworth Trust Board	65,000
Eat My Lunch	5,000
First Foundation	50,000
Foster Hope Charitable Trust	5,000
Garden to Table Trust	7,500
Heart Kids New Zealand Incorporated	5,000
Home and Family Counselling Centre	6,500
Inzone Education Foundation	5,000
Jigsaw Central Lakes	5,000
Kākano Youth Arts Collective	20,000
Kids with Arthritis NZ	10,000
Kidscan Charitable Trust	15,000
Koru Care Charitable Trust	5,000
Lifeline Aotearoa	7,500
Liggins Institute	500,000
Lions Transplant House	5,000
Mana-ā-Riki / Kootuitui ki Papakura Programme	200,000
McCahon House Trust	5,000
Mercy Hospice	5,000
Muscular Dystrophy Association of New Zealand	750
National Contemporary Art Award 2018 (Hamilton City Council)	5,000
Nelson Tasman Hospice	5,000
New Zealand Catholic Women's League	5,000
New Zealand Paramedic Education & Research Charitable Trust	5,000
Ngā Tangata Microfinance Trust	5,000
North Shore Hospice Trust	5,000
NZ Breast Cancer Foundation	5,000
Ohana Young Parent Charitable Trust	3,060
Ōtautahi Creative Spaces	5,000
Paw Justice	5,000
Paws 4 Life Charitable Trust	5,000
Pillars (Auckland)	5,000
Pohutukawa Trust New Zealand	5,000
Project Jonah	5,000
Project Moroto	5,000
Radio Lollipop (New Zealand) Limited	3,000
Rainbow Youth Incorporated	5,000
Recreate NZ	5,000
Reuben Davis	10,000
Royal New Zealand Coastguard	2,500
Sistema Aotearoa	120,000
Sistema Waikato	15,000
Sistema Whangarei	5,000
SPCA - Auckland	10,000

# Notes to the Financial Statements (continued)

## 3 Donations and Grant Expenses (continued)

SPCA - Waiheke	5,000
St Dominic's Catholic Primary School PTA	2,000
St John	5,000
St Vincent de Paul Otahuhu	2,500
Stroke Foundation New Zealand	5,000
Te Kura o Hato Hohepa te Kamura (St Joseph the Carpenter School)	65,000
Te Puawaitanga ki Ōtautahi Charitable Trust	5,000
Teach First NZ	50,000
The Lifewise Trust	23,963
The Moko Foundation	53,500
The UpsideDowns Education Trust	45,000
Thomas Ben Fyers	10,000
Urology Dept., Manukau Super Clinic	200,000
Variety NZ	7,500
Who Did You Help Today? Trust	100,000
	<u>3,007,125</u>

## 4 Operating Expenses

The Hugo Charitable Trust is very grateful for the external funding of operational expenses by Maryanne Green and Alice Watson from the distributions from the Hugh Green Family Trust. The Trustees of the Hugh Green Family Trust are Maryanne Green, Mark Owens and Alice Watson.

## 5 Investments

Investments consist of term deposits held at bank, and are classified as held-to-maturity investments. They are initially measured at fair value plus any directly attributable transaction costs. Subsequent to initial recognition, they are measured at amortised cost using the effective interest method.

## 6 Contingencies and Commitments

There are no capital commitments or contingent liabilities at balance date.

## 7 Subsequent Events

There have been no events subsequent to balance date that would materially affect the information presented in the financial statements.



# Independent Auditor's Report

To the Trustees, Settlor and Founder of the Hugo Charitable Trust

## Report on the financial statements

### Opinion

In our opinion, the accompanying financial statements of the Hugo Charitable Trust ("Hugo") on pages 27 to 34:

- i. present fairly in all material respects Hugo's financial position as at 31 March 2018 and its financial performance and cash flows for the year ended on that date; and
- ii. comply with Public Benefit Entity Standards Reduced Disclosure Regime (Not For Profit).

We have audited the accompanying financial statements which comprise:

- the statement of financial position as at 31 March 2018;
- the statements of comprehensive revenue and expense, changes in Trust funds and cash flows for the year then ended; and
- notes, including a summary of significant accounting policies and other explanatory information.



### Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (New Zealand) ('ISAs (NZ)'). We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

We are independent of Hugo in accordance with Professional and Ethical Standard 1 (Revised) Code of Ethics for Assurance Practitioners issued by the New Zealand Auditing and Assurance Standards Board and the International Ethics Standards Board for Accountants' Code of Ethics for Professional Accountants (IESBA Code), and we have fulfilled our other ethical responsibilities in accordance with these requirements and the IESBA Code.

Our responsibilities under ISAs (NZ) are further described in the auditor's responsibilities for the audit of the financial statements section of our report.

Our firm has also provided other services to Hugo in relation to accounting and tax services. Subject to certain restrictions, partners and employees of our firm may also deal with Hugo on normal terms within the ordinary course of trading activities of the business of Hugo. These matters have not impaired our independence as auditor of Hugo. The firm has no other relationship with, or interest in, Hugo.



### Other matter

The Trustees, on behalf of Hugo, are responsible for the other information included in the entity's Financial Statements for the year ended 31 March 2018. Our opinion on the financial statements does not cover any other information and we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears materially misstated. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.





### Use of this independent auditor's report

This independent auditor's report is made solely to the Trustees as a body. Our audit work has been undertaken so that we might state to the Trustees those matters we are required to state to them in the independent auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Trustees as a body for our audit work, this independent auditor's report, or any of the opinions we have formed.



### Responsibilities of the Trustees for the financial statements

The Trustees, on behalf of Hugo, are responsible for:

- the preparation and fair presentation of the financial statements in accordance with generally accepted accounting practice in New Zealand (being Public Benefit Entity Standards Reduced Disclosure Regime (Not For Profit));
- implementing necessary internal control to enable the preparation of a set of financial statements that is fairly presented and free from material misstatement, whether due to fraud or error; and
- assessing the ability to continue as a going concern. This includes disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless they either intend to liquidate or to cease operations, or have no realistic alternative but to do so.



### Auditor's responsibilities for the audit of the financial statements

Our objective is:

- to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error; and
- to issue an independent auditor's report that includes our opinion.

Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs NZ will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error. They are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

A further description of our responsibilities for the audit of these financial statements is located at the External Reporting Board (XRB) website at:

<http://www.xrb.govt.nz/standards-for-assurance-practitioners/auditors-responsibilities/audit-report-8/>

This description forms part of our independent auditor's report.

KPMG  
Auckland

26 April 2018



# Contacts

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## Charities Supported by Hugo:



Click on the logos to visit the charity websites.



