



ŌTAKI HERITAGE
Te Whare Pouhere Taonga o Ōtaki

**ŌTAKI HERITAGE ANNUAL
REPORT**

1 JULY 2024 – 30 JUNE 2025

**‘Discover, enjoy &
explore
Ōtaki's rich heritage’**

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Foreword

Although a mixture of ups and downs, overall the year can be characterised as a successful one. We have met most of our targets, and, notably, achieved good results in important areas including exhibitions, collection management, and the introduction of IT improvements into the way we do things.

While much of the credit for that result rests on our volunteers, the support of Kāpiti Coast District Council (KCDC), in particular from the heritage and property groups, has been invaluable. The Philipp Family Foundation, too, have been important supporters of Ōtaki Heritage. And, of course, without our visitors, and those who use our resources to support their research efforts, what we do would bring little enjoyment to anyone, and deliver limited value to our community.

However, some challenges have also emerged. Managing them effectively over the short term is critical to making sure that Ōtaki Heritage continues to make its unique contribution to ensuring that Ōtaki stories are collected, protected, and made accessible in the future. Key to success will be establishing and maintaining a pool of volunteers of the right size, and with expertise in the right areas. Progress has been made, but the more people who wish to work with us as volunteers, the more certain that this target will be met.

In the past year several people who have contributed to Ōtaki Heritage have passed away. Among them were Marion Petley and Maurice King.

In closing, mention needs to be made of people who have had a long and generous association with the Museum. I would like to particularly acknowledge Jan Harris and Aileen Lumley who have retired, and our long-serving Treasurer Neale Ames, who will retire in October.



David Ledson

Chair

A glance at what our visitors have said

GUESTS

- 12/29/23 Anna, Sergius, Kerstin, Hendrik
Thank you for our local museum. Awesome volunteers and great memorabilia.
- 29/2/23 Renee Webster and Niko Grant - Fergie
Such a wonderful resource and place to wander around. Recognised lots of family names and places.
- 9/2/23 Wini + Lee Pepping, great coverage of history info.
- 1/2/23 Thanks so much for preserving this history - Kahite ano.
- 11/24 Barry + Clare Footer
- 1/24 Peter + Heather Penner.
- 24 Barb + Rob Meier. ChCh. Thanks. Lovely timber.
- 24 Quentin + Anita Lowrey Te Hora Beach
- 12/1/24 Marine and Sofiane Thank's for this local exhibition!
- 18.01.24 Ruth, Jane, Toodles, Clare, Teresa & Henry.
Ash - lovely little museum & ~~lots~~ local stories: don't usually hear these kinds of stories.
- 19.01.24 Pamela Gernish
Nana really interesting source of local history.
- 20.01.24 Ayia & Callum really cool museum. we came for the Kapiti due hunt ☺
- 21.01.24 Tawana + Asha & Tendai Love the piano. lovely museum. ☺
- 21.01.24 Family outing from wellington - chasing clues.
- 21.01.24 Clue Hunt 1st stop on what promises to be a great day. Thankyou for your warm welcome.

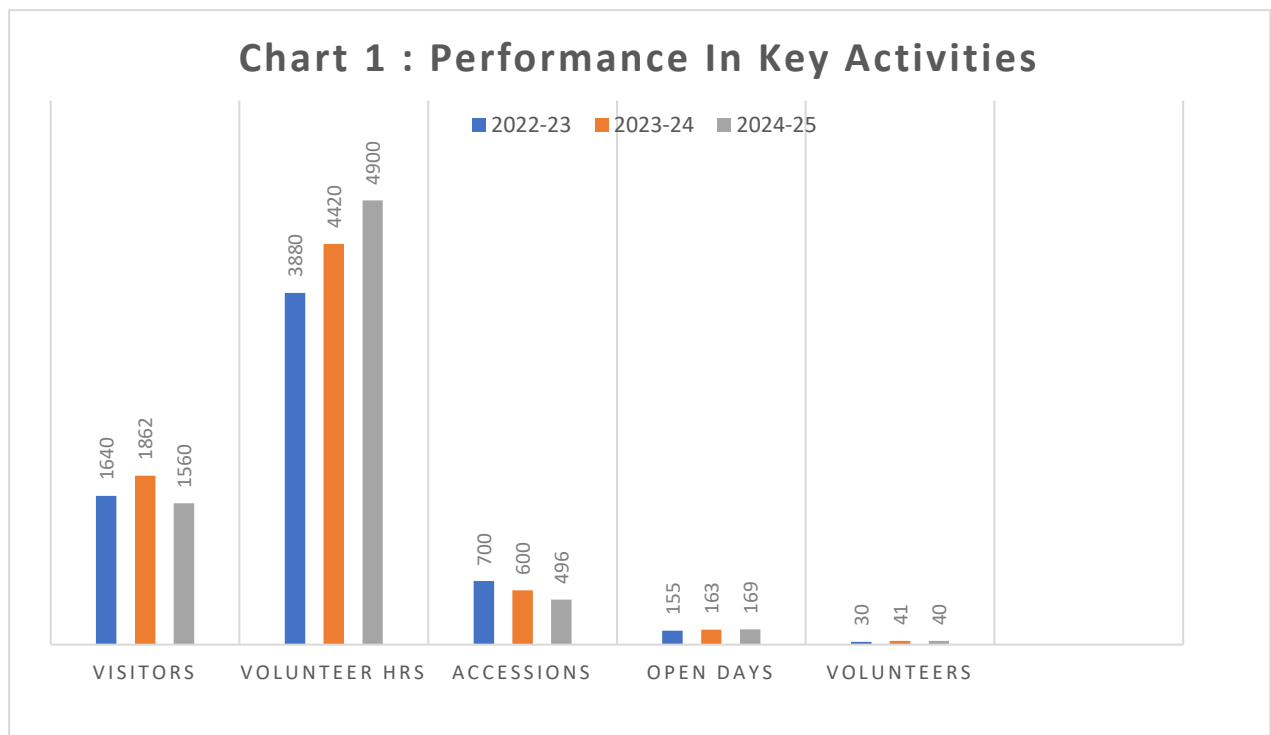
What we achieved

As Charts 1 and 2 below illustrate, the performance across our key activities was uneven compared to last year's performance. While in most areas the results are similar or better, in a couple they are not as good.

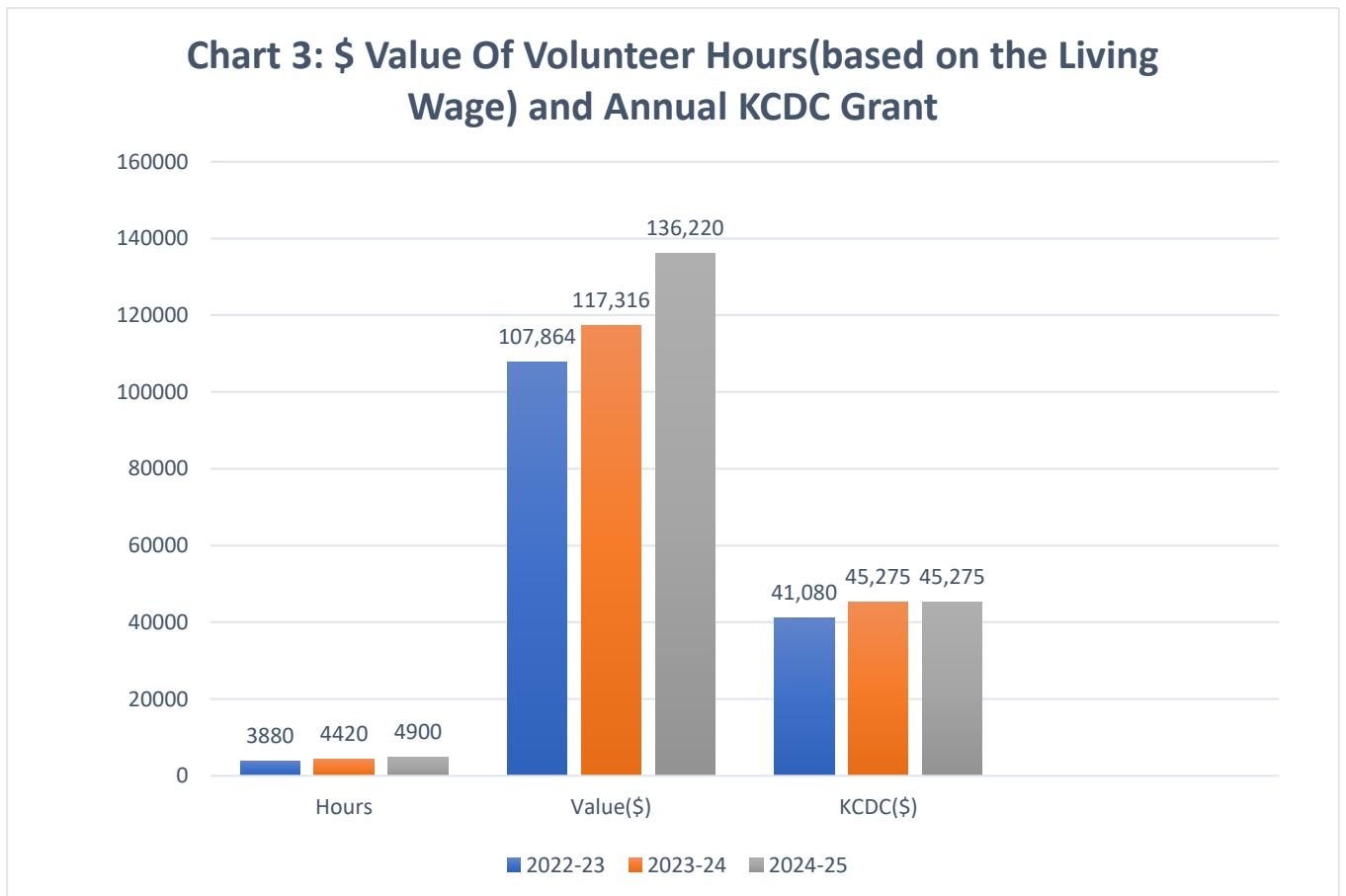
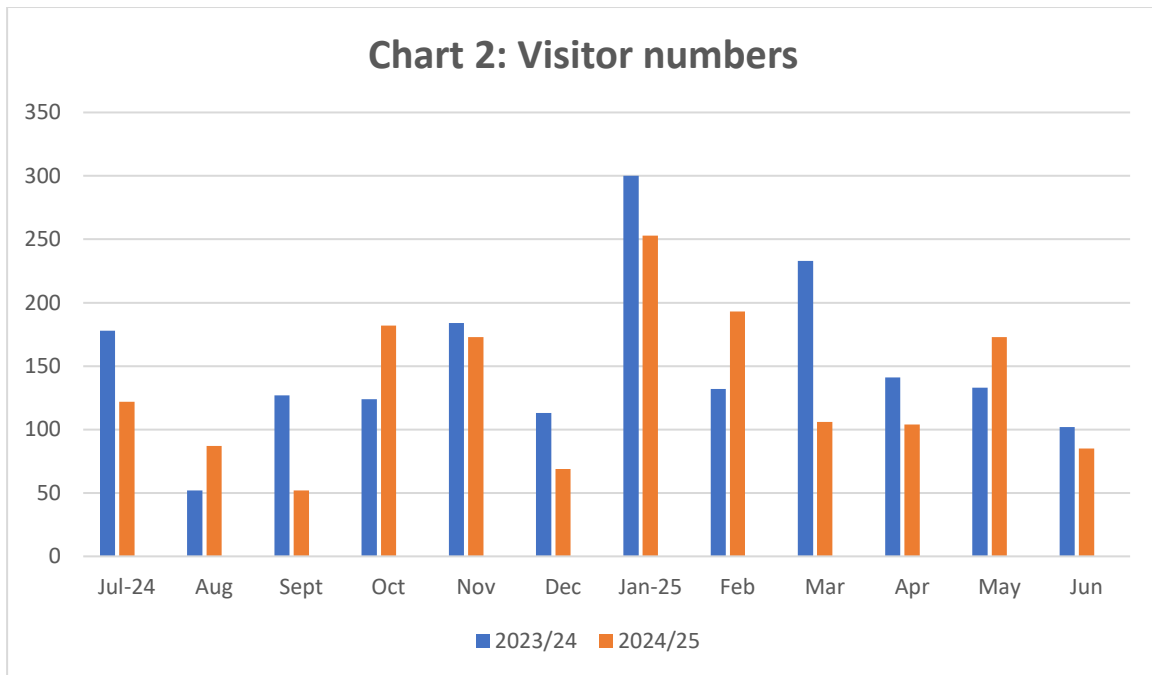
The decline in visitor numbers is particularly disappointing – as is our limited success in attracting a large and diverse group of local visitors younger. However, analysis of Graph 2 indicates that singular events can have a material impact on the results. For example, the increases in January reflect the impact of the Discover Kāpiti Heritage Clue Hunt, and the numbers in March 2024 incorporate the numbers who attended the launch of the 'Ōtaki Beach' exhibition. Nevertheless, it is a measure on which we will continue to keep a close watch.

The increase in volunteer hours principally reflects two things. The first is the considerable work that went into planning and researching the 'From Kāinga to Village' exhibition. The second is the extraordinary effort that goes into managing our collection, and which is not reflected in the measurement of the number of items accessioned. Chart 3 shows the value of volunteer hours based on the living wage – the measure used by Volunteering New Zealand.¹

That less items have been accessioned, is because a great deal of time has been spent by the collections team in tidying up and correcting entries on the Museum's data base, as well as in reviewing and reboxing items already accessioned and located in storerooms.



¹ <https://www.volunteeringnz.org.nz/data-advocacy/statistics>



What we do and how we do it

The what

The Ōtaki Heritage Vision is 'to make Ōtaki stories of the past available and accessible today and in the future to the benefit of the community.' Associated with this is the Mission, 'to collect, protect and share heritage resources that enable Ōtaki stories to be accessible to as many people as possible.'

The how

Volunteers are central to how we operate. In addition to the wide range of activities volunteers carry out, a small number of volunteers have governance responsibilities; how these work in practice is shown on page 9.

Most of the volunteers staff the desk in the main exhibition space and are the face of the Museum when it is open. They welcome visitors, and guide them to the exhibition and other resources that we hold; especially those in the Public Reading Room. This is a popular place for those visitors who come to the museum to research Ōtaki connections.

Other volunteers regularly assist with cataloguing our collection, working on articles for the annual historical journal, and on an as required basis, helping to prepare and mount exhibitions. We really value everyone's contribution – without it we could not operate the museum, nor appropriately look after the heritage items/taonga that people entrust to our care.

Volunteer health and safety

A two-story building with the only access between floors provides safety risks for anyone using the stairs. Given that our volunteers are mainly in their 60's and 70's – and a few are in their 80's – this is a particular risk for them; exacerbated when people are carrying things.

There is also a need to ensure that the pressures of operating Ōtaki Heritage do not fall too heavily on the small number of people carrying out vital work in areas critical to our effective operation as a museum.

Given these risks, it was satisfying that there were no recordable health and safety incidents during the year.

Governance/operations organisational framework

Governance

Trust Board

Chair: David Ledson **Deputy Chair:** Judith Miller **Secretary:** Liz Brown **Members:** Len Nicholls, Trish Grant, Graham Lonsdale
Mana Whenua Representative: Rawiri Rikihana **Community Board Representative:** Chris Papps **Financial Adviser:** Neale Ames

Responsibilities: Strategic direction, finance, contracts(eg KCDC), reporting, publicity/marketing, IT systems, mana whenua relationship, heritage engagement at District level, museum building, community connections, relationship with volunteers, health & safety, legal issues.

Operations

Exhibitions Team

Responsibilities: Exhibition preparation, Virtual exhibitions, coordinating exhibition advertising host management
Board Liaison: David Ledson
Coordinator: David Ledson
Members: TBD each exhibition

Financial & Related Matters Team

Responsibilities: Financial matters and building administration
Treasurer: Neale Ames

Communications Team

Responsibilities: Annual Journal, website content, newspaper articles, public presentations,
Board Liaison: Judith Miller
Coordinator: Sarah Maclean
Members¹: David Ledson, Jeanette Carpenter

Volunteers

Responsibilities: Volunteer engagement, recruitment, and roster
Board Liaison: Trish Grant
Members: Judith Miller, Liz Brown²

Collection Management Team

Responsibilities: Records management, accessioning, Collection care
Board liaison: Judith Miller
Coordinator: Sue Carroll
Members: Judith Miller, Jenn Corbitt, Chris Greenwood

Community Connections

Responsibilities: Schools relationships, community engagement, mana whenua relationship
Board liaison: Liz Brown
Coordinator: Liz Brown
Members: Judith Miller, Trish Grant, Chris Papps
 mana whenua representative

IT Systems Team

Responsibilities: Liaison with IT support providers, digital displays, management of IT systems
Board Liaison: Len Nicholls
Coordinator: Len Nicholls
Members: Len Nicholls, Graham Lonsdale

¹ A specific team will be formed to oversee and manage production of the Journal

² Principally to support recruitment related activities

Our key partners

Kāpiti Coast District Council

The Trust leases the museum building from Kāpiti Coast District Council (KCDC), and works closely with Kelvin Irvine and Jasmine Speight from Property and Facilities to manage the building. We have a formal Memorandum of Agreement with KCDC Libraries and Cultural Services in respect of our annual grant, which sets out some performance guidelines. We meet regularly with Rosie Salas, Advisor Arts, Museums and Heritage, to review our activities and performance, and identify areas in which the Council may be able to help us.

Ngā Hapū o Ōtaki

Given the ambition to tell stories about Ōtaki, and stories that capture an Ōtaki perspective, a collaborative relationship with Ngā Hapū o Ōtaki is vital. The relationship is formalised in the Ōtaki Heritage Trust Deed which provides for two Ngā Hapū o Ōtaki representatives to be on the Trust.

The Philipp Family Foundation

The Philipp Family Foundation has been a very strong supporter of the museum and continues to support Ōtaki Heritage on a case-by-case basis.

Discover Kāpiti Heritage Group

The Discover Kāpiti Heritage Group consists of the Paekākāriki Station Museum, Steam Incorporated, Wellington Tramway Museum (at Queen Elizabeth Park), Kāpiti US Marines Trust (at Queen Elizabeth Park), Museum of Aviation (Kāpiti Road, Paraparaumu), Southward Car Museum (in Otaihanga), the Kāpiti Coast Museum (in Waikanae), Toi Mahara Gallery, The Kilns at Te Horo, Ōtaki Museum and Friends of Ōtaki Rotunda.

The group meets regularly and collaborates on the annual Discover Kāpiti Heritage Weekend Clue Hunt on Wellington Anniversary weekend and in the annual Wellington Heritage Festival held in October/November. It is now starting to look for wider opportunities for collaboration help improve organisational performance.

Volunteer Kāpiti

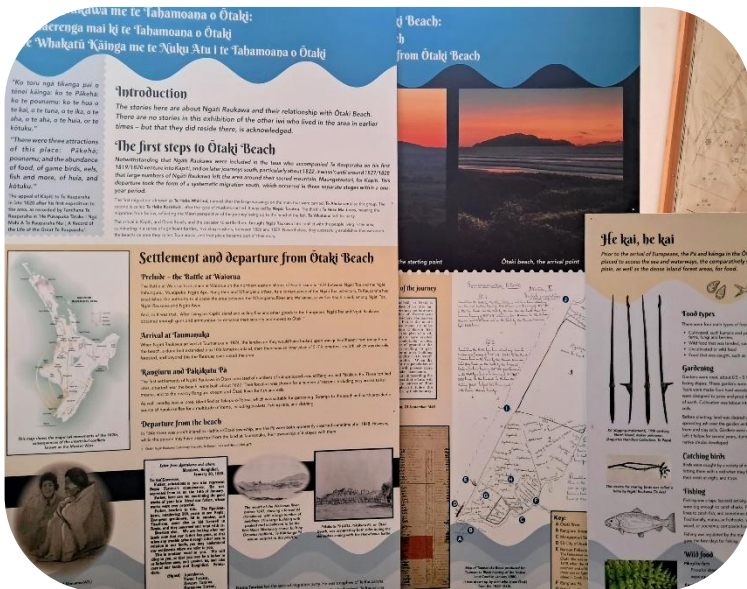
Volunteer Kāpiti actively promotes, supports, and strengthens volunteering throughout the Kāpiti Coast. They have been very helpful in assisting us fill volunteer roles, and in providing access to people with skills that have proved to be very useful.

Exhibitions

Since its establishment, the museum has had a policy of changing exhibitions during the year; rather than having a permanent exhibition. While this practice continued, it is likely that in the 2025-2026 years there will be only one major exhibition.

Our exhibitions would not be installed so efficiently and effectively without the generous assistance of Kevin Garratt and Luke Richards. Heni Jacob has made a vital and generous contribution in providing Te Reo Māori for the exhibition story boards.

Te Whakaaturanga o Te Tahamoana o Ōtaki | Ōtaki Beach. March 2024 – March 2025



Story boards from the exhibition

Five months work, principally by two volunteers, was required to get this exhibition ready. It contains stories about The Beach - from the arrival of Ngāti Raukawa, missionaries and whalers, and some of the key 19th and 20th century developments and events.

Visitor numbers have generally been good and there has been strong local interest.

1760 people visited this exhibition

Exhibition challenges

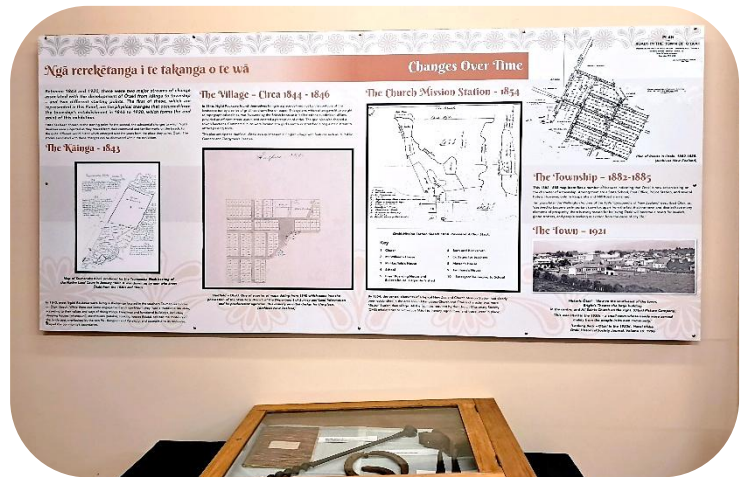
It has become evident that the current approach to exhibitions provides some real challenges to being sustainable, in terms of (1) the volunteer effort required, and (2) the cost. Work is underway to identify how IT, and in particular artificial intelligence, can be used to make preparation of exhibitions more efficient. Complementary work will also be progressed to look at ways to reduce cost, without unacceptably compromising quality.

Mai i te Kāinga ki te Tāone Iti, Wāhanga 1: 1843-1920 | From Kāinga to Village, Part 1: 1843-1920. April 2025 - TBD

Two volunteers worked on this exhibition from December 2024 to April 2025. It tells the story of how the town began and is the third in our series on the development of Ōtaki.

Once again, the contributions of Kevin Garratt, Luke Richards and Heni Jacob were invaluable.

The photograph is of one of the exhibition's story boards showing how in 1843, Ngāti Raukawa were living in whare around pā on the beach and eighty years later their kāinga had been transformed into a quintessential English provincial town of the period.



A story board from the exhibition showing changes from kāinga to village between 1843 and 1921

School/Kura engagement

Progress in engaging with local schools and kura has been slow, and nothing substantial has been achieved. The main reason is not any lack of willingness to work together, but rather the difficulty of finding time to have the conversations needed to agree what the collaborative opportunities are.

We are hopeful that progress may be able to be made in Term 4 of 2025.

Community group engagement

During the year we have hosted visits from a range of community organisations, we have visited them to talk about Ōtaki Heritage, and we have supported their heritage activities. Visitors included the local Rebus Club, Kea Sea Scouts, a local MetLife Care retirement village and the Upper Hutt Cosmopolitan Club. Presentations on local history and oral histories were also delivered to Kāpiti U3A and residents of Speldhurst Village.

We also participate each year in the Ōtaki Community Expo – hosted by the Ōtaki Promotions Group. It provides us with an opportunity to promote Ōtaki Heritage, and to connect with other groups and organisations.

Collections management

Having an effective collections management system is key to (1) people entrusting us with their gifts, (2) being able to care for those gifts, (3) knowing what we have that can help us tell stories, and (4) knowing where it is located in our four store rooms. That we do have an effective system is due to the commitment of a small group of dedicated volunteers who meet regularly and carry out the detailed work required.

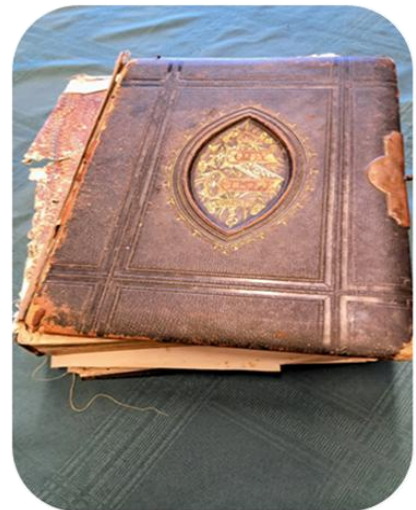
When items are donated, the collections team researches them so they can recommend to the board whether an item should be accessioned into our collection. Most are recommended for the collection, but some are not – and on very rare occasions the donor asks for the item to be returned.

Two donated items from 2024/2025 which were not added to the collection

Earlier this year a red Warehouse bag was found hanging on the front door handle of the museum. Inside it was a bedraggled Bible, and no indication who had left it there.

An inscription at the front described that this Bible had been presented to the Reverend Samuel Garlick and Mrs Garlick *'on the occasion of their marriage'* in the Wesley(Methodist) Church in Wellington. Their marriage, on 31 March 1880, was the first in the church.

A short time after the Bible had been 'donated', the donor contacted us and asked for it to be returned. We willingly and promptly did so. It was exchanged for a delightful gift of a creamy morning tea.



The Bible

For some years four medals lay raggedly in a small and unassuming box in one of the museum's Collection Stores. The medals tell of a remarkable record of service which made an otherwise ordinary British soldier Corporal Phillip Lambert, a remarkable man.

The medals from left to right are – the Crimean War Medal(1855), the Crimean War Medal(1855), the Second China War Medal, and the New Zealand medal. While these medals, as do all medals, tell the story of a soldier's service –they do not have any connection with Ōtaki. Consequently, they are presently stored in our collection while we consider where their future home might be.



Corporal Lambert's medals

Some of the year's highlights

The Discover Kāpiti Heritage Clue Hunt



Enjoying the pianola while on the hunt for clues

The Discover Kāpiti Heritage Clue Hunt was held in January, during Wellington Anniversary Weekend. Across the ten participating Kāpiti museums visitor numbers at 2,311 were slightly up on the 2,146 from last year. Our 156 visitors were 38 less than the 2024 result. However, one Ōtaki visitor did win one of the four prize packs on offer.

As was the case last year, many of those visiting were families from out of the area who were starting their Clue Hunt from the northern end of the trail. On the other hand, there were very few participants from Ōtaki.

There will be another Clue Hunt in January 2026.

Refurbishment of the museum's frontage



Scaffolding in place in July 2024

For some time, the Main Street frontage of the museum building gave it the appearance of bedraggled block of yellow concrete. However, efforts by KCDC and its contractors in the second half of 2024, finished with a much-improved appearance. Removal of decaying plywood boards, and refurbishment of the façade behind them, has lifted the tone of the building. We also used the opportunity to have a large sign with our name on it put on the frontage.



The finished building

While it still seems to be a building that some passersby do not notice, the KCDC refurbishment work is much appreciated by those of us who work in the museum.

The IT/Digital Strategy project

The IT/ Digital Strategy project has been made possible by funding generously provided by KCDC's Museum and Heritage Fund and the Philipp Family Foundation. With the upgrade to IT systems used by the volunteers, and the installation of a touch screen console in the main exhibition space, good progress has been made.

Work is now underway to give effect to Stage 2 of the project, the purchase of several interactive displays. This work is expected to be completed with the 2025/26 financial year.

The 2024 Ōtaki Historical Journal

Due to the commitment and skill of its authors, editor, proof readers, and designers, the 2024 edition of the Ōtaki Historical Journal maintained the high standards of its predecessors.

It had been agreed that production of the Journal in its current format would be funded to 2028; noting this would mark 50 years since the first volume was published in 1978. However, in view of the financial pressures facing Ōtaki Heritage, the longer-term future of the Journal scheduled for 2027, will now be completed early in 2026.



Ann Chapman speaking at the Journal launch

It was launched in November with a number of the writers speaking about their articles to a large audience.

The Wellington Heritage Festival



Anthony Dreaver speaking at the event

Ōtaki Heritage participated in the annual Wellington Heritage Festival on 9 and 10 November. On 10 November the museum hosted a special event attended by 28 visitors. Speakers at the event were:

- Mary O'Keeffe, who spoke about 'Living on the coast – the archaeology of the Kāpiti Coast'
- Dr Bruce McFadgen's subject was 'What archaeology tells us about the dangers of living on the Kāpiti- Manawatū Coast'
- Anthony Dreaver whose presentation was 'Death of a mariner: Coastal shipping from the Port of Waikanae'

The next few years – challenges and opportunities

The next few years have some major challenges that need to be managed, and opportunities that need to be grasped, if Ōtaki Heritage is to prosper and survive.

The challenges

Funding

While the KCDC annual grant is a generous one, the reality is that almost 30% of it is returned as rental on the building. The remaining 60% is not sufficient to cover the costs required to credibly aspire to excellence, rather than just accept a much-reduced level of performance as a museum. Furthermore, as we seek improvements by way of new technologies, the capital costs that can be accessed by funding grants do not cover the inevitable accompanying increases in operating costs.

Given that any increase in the KCDC grant is unlikely, at least in the immediate future, hard choices will need to be made to ensure aspiration and funding are aligned – otherwise Ōtaki Heritage may have to lock the museum door.

Remediation of the building

The museum is in a building designated as ‘earthquake prone.’ It is due for remediation by 2030, which means that planning work for this will need to start within the next couple of years. The work presents both challenges and opportunities.

The principal challenge is to have an early understanding of the implications of the work for us – will we have to vacate the building, if so, for how long; will the collection need to be removed from the building, if so, who will fund the costs of moving and temporary storage.

As to opportunities, the important question for an answer is whether there will be an opportunity to improve the building’s operation as a museum during the remediation work. Clearly, the earlier the related information is made available to us, the more well placed we will be to manage the challenges and grasp the opportunities – especially in terms of addressing the financial implications.

The volunteer pool

With the number of volunteers we now have, and the particular areas of expertise within the group, we are in a vulnerable position. Institutional knowledge is vital, and to operate credibly as a museum, a professional approach is critical in specific areas of its operations. With our current financial constraints, because we cannot afford to pay for an external provider, some of these areas of professional knowledge need to be available in-house.

While we currently have most of the expertise needed, it resides within just one or two people. Consequently, we are exposed to significant operational risk with 'single points of failure.' This situation is exacerbated by the reality that within a few years, some of those people will leave the organisation. Establishing a robust succession plan will not be an easy task.

The opportunities

Changes to local government legislation

The Government has introduced the Local Government (Systems Improvement) Amendment Bill, which is intended to make changes to council operations through a set of targeted amendments to the Local Government Act 2002. When the Bill is enacted, a new section will require councils to have regard to the contribution of core services to their communities when performing their functions. Museums are specifically included in the definition of core services. Councils will need to have regard to core services when making decisions on their approach to financial management.

These changes make an important change to the context within which funding conversations with KCDC could take place.

Investment in IT

Investment in IT creates three important opportunities for us to do things in a different and better way:

- (1) new exhibitions can be arranged efficiently, and in a way that means more volunteers can be involved in the activity,
- (2) exhibitions can practically be 'refreshed' more frequently, and
- (3) exhibitions containing an interactive element should attract a more diverse range of visitors.

Initial indications are that it has considerable potential to address some key areas of concern, including the effort and cost demanded by exhibitions, engaging volunteers and changing our visitor demographics. Nevertheless, acquiring IT systems will require access to external funders and, inevitably, will result in increases to baseline operating costs.

The Ōtaki Heritage Team

Volunteers

Liz Brown
Jeanette Carpenter
Sue Carroll
Jenn Corbitt
Chris Greenwood
Jenny Hare
Roderick Kinghorn
Judith Miller
Mary-Jane Rivers
Pahi Lemmon
Lois Riseley
Teresa Wallace
Heather Watson

Helen Naylor
Leone Bevan
Di Buchan
Jenny Glen
Trish Grant
Jenny Hare
Margaret Hayward
Catherine Jaubert
Wayne Webster
Debra White
Moirā Wylie
Len Nicholls
Brian Rosenberg

Julie Jensen
Michael Johns
Graham Lonsdale
Aileen Lumley
Sarah Maclean
Inawa Paviour-Smith
Carol Piercy
Frank Fell
David Ledson
Tom Wilkinson
Ivanka Marta
Marg Tobin
Janice King

Trustees

David Ledson(Chair)
Judith Miller(Deputy Chair)
Liz Brown(Secretary)
Trish Grant

Graham Lonsdale
Len Nicholls
Chris Papps (Ōtaki Community Board)
Rawiri Rikihana (Ngā Hapū o Ōtaki)

Treasurer

Neale Ames

2024– 2025 Financial Report



01 August 2025

The Trustees
Otaki Heritage
49 Main Street
OTAKI 5512

Dear Trustees

Concerning the Review of the Otaki Heritage

The purpose of the financial review is to ensure that the annual Performance Report is reliable and provides reporting integrity for the users of the report. The review also confirms compliance with the relevant New Zealand financial reporting framework and has general acceptability with sound accounting practice.

The good quality of the annual performance report, workpapers and the records has helped in the completion of the Assurance Practitioner's review work for the year ended 30 June 2025.

The Trust minutes were completed to a good standard. A systems profile was reviewed and this demonstrated sound systems in place for the administration of the Trust. The use of the Xero software has been helpful for the review work. Risk work papers were agreed for the regulations and covid areas for the Trust.

There appears to be no other special comment to be made as the result of the review work. My thanks are recorded for the help from Neale Ames.

A signed copy of the review report is attached. I am available for the review for the coming year to 30 June 2026.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Dennis Blank', written over a horizontal line.

Dennis Blank
Reviewer

Performance Report

Entity Name

Otaki Heritage

For the year ended

30/06/2025

FINANCIAL INFORMATION

Statement of financial performance

	Note	Current year \$	Last year \$
Revenue			
Donations, koha, bequests and other general fundraising activities		4,490	6,641
General grants		45,275	44,085
Capital grants and donations		-	-
Government service delivery grants/contracts		-	-
Non-government service delivery grants/contracts	1	-	-
Membership fees and subscriptions		-	-
Revenue from commercial activities		-	-
Interest, dividends and other investment revenue		8,251	8,895
Other revenue		-	-
Total revenue		58,016	59,621
Expenses			
Expenses related to fundraising		-	-
Employee remuneration and other related expenses		-	-
Volunteer related expenses		-	-
Expenses related to commercial activities	2	-	-
Other expenses related to service delivery		73,112	62,302
Grants and donations made		-	-
Other expenses		1,952	-
Total expenses		75,064	62,302
Surplus/(Deficit) for the year		- 17,048	- 2,681

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

Date 8.8.25
 Signature [Signature]
 Name NEALE AMES
 Position TREASURER

Date 13.8.25
 Signature [Signature]
 Name DAVID LEDSON
 Position CHAIR





01 August 2025

The Trustees
Otaki Heritage
49 Main Street
OTAKI 5512

Dear Trustees

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There appears to be no other special comment to be made as the result of the review work. My thanks are recorded for the help from Neale Ames.

A signed copy of the review report is attached. I am available for the review for the coming year to 30 June 2026.

Yours sincerely

A handwritten signature in blue ink, appearing to read 'D. Blank', written over a horizontal line.

Dennis Blank
Reviewer

Otaki Heritage

Performance Report for the Year Ended 30 June 2025

INDEPENDENT ASSURANCE PRACTITIONER'S REVIEW REPORT

To the Trustees of Otaki Heritage

Report on the Performance Report:

I have reviewed the accompanying performance report of the Otaki Heritage, which comprise the entity information, the statement of service performance, the statement of financial performance and the statement of cash flows for the year ended 30 June 2025, the statement of financial position as at 30 June 2025, and the statement of accounting policies and other explanatory information.

The Responsibility of the Trustees for the Performance Report:

The Trustees of the Otaki Heritage are responsible for the preparation and fair presentation of the 30 June 2025 annual performance report in accordance with the PBE Tier 3 (NFP) Standard and for such internal control as the Trustees determine is necessary to enable the presentation of the performance report that is free from material misstatement, whether due to fraud or error.

The Assurance Practitioner's Responsibility:

My responsibility is to express a conclusion on the accompanying financial statements. I conducted my review in accordance with International Standard on Review Engagements (New Zealand) (ISRE (NZ)) 2400, Review of Historical Financial Statements Performed by an Assurance Practitioner who is not the Auditor of the Entity. ISRE (NZ) 2400 requires me to conclude whether anything has come to my attention that causes me to believe that the financial statements, taken as a whole, are not prepared in all material respects in accordance with the applicable financial reporting framework. This Standard also requires me to comply with relevant ethical requirements.

A review of the annual performance report in accordance with ISRE (NZ) 2400 is a limited assurance engagement. I will perform procedures, primarily consisting of making enquiries of management of others within the entity, as appropriate, and applying analytical procedures, and evaluating the evidence obtained.

The procedures performed in a review are substantially less than those performed in an audit conducted in accordance with International Standards of Auditing (New Zealand). Accordingly, I do not express an audit opinion on the performance report.

Other than in my capacity as assurance practitioner I have no other relationship with, or interests in, the Otaki Heritage.

Otaki Heritage**Performance Report for the Year Ended 30 June 2025****INDEPENDENT ASSURANCE PRACTITIONER'S REVIEW REPORT**

(continued)

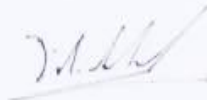
Conclusion:

Based on my review, nothing has come to my attention that causes me to believe that the annual performance report of the Otaki Heritage do not present fairly, in all material respects, the financial position of the Trust as at 30 June 2025 and of its financial performance and cash flows for the year ended on that date, in accordance with PBE Tier 3 (NFP) Standard.

Report on Other Legal and Regulatory Requirements:

There are no concerns to be reported.

My review was completed on 01 August 2025, and my conclusion is expressed at that date.



Dennis Blank CA
Chartered Accountant
Waikanae

