

## Welcome



Welcome to the Summer edition of State Trustees Charitable Trusts Update, a biannual newsletter to keep you up to date with news and activities within our Charitable Trusts division.

In this newsletter we focus on older people and highlight two grants which address some of the issues that face older people in our community.

Unfortunately, in our work at State Trustees we occasionally come across instances where older people have been taken advantage of financially by those they trust most. There is evidence that this is a growing problem in our community. Financial elder abuse is complex and back in 2008 we engaged Monash University to undertake research to shed light on this important social issue. The third report delivered through this project is soon to be released. For more information on the outcomes of the research please refer to our website.

In this newsletter we have introduced a new feature: We have listed each of the new charitable trusts established during 2010 to recognise the generosity of our donors and bequestors. Charitable trusts can be established with an initial donation as small as \$10,000, or through a bequest in your Will.

As you can see the State Trustees Australia Foundation is growing fast – we now administer over \$34 million and have 145 management accounts, most through clients' Wills. More and more of our Will clients are choosing to benefit charitable causes in perpetuity through a bequest in their Will. The current favourite causes that our clients support are: animal welfare; medical research and treatment; and faith-based organisations or causes.

Also, in this edition we ask for your help – we're seeking to locate former residents of St Nicholas Hospital who may be eligible to access funds from the 'The St Nicholas Hospital Trust', of which State Trustees is custodian trustee. Read more in our story overleaf.

We hope you enjoy this edition. We wish you all a happy and safe Christmas and compliments of the season.

Kind regards,



A.G. (Tony) Fitzgerald | Managing Director

## Charitable Trusts News

### New charitable trusts 2010

State Trustees recognises the generosity of the following bequestors whose estates established charitable trusts valued at over \$7.85 million during 2010. State Trustees Charitable Trusts division has the privilege of administering these perpetual charitable trusts bequests.

#### State Trustees Australia Foundation

<b>Sidney Mabel Williams</b>	Medical charities & churches
<b>Paula Clements</b>	Medical & welfare charities
<b>Harry Schofield</b>	Animal & medical charities
<b>Clarice Nellie Dibbin</b>	Medical & animal charities
<b>Guido Polano</b>	Welfare charities
<b>Donald Mann</b>	general charitable purpose
<b>Clarry Booth</b>	Wintringham Hostels
<b>Denis Aloysius King</b>	Royal Children's Hospital
<b>Leslie Gordon Vaughan</b>	Lort Smith & Lost Dogs Home
<b>Dorothy Isabel Buttle</b>	Alfred Group of Hospitals
<b>Shirley Edith Poole</b>	Birds Australia & Healesville Sanctuary
<b>Maria Emily Hanstock</b>	Medical & welfare charities
<b>Neville Brown</b>	General charities
<b>Jessie Ross</b>	Eye & Ear Hospital
<b>Sylvia Mary Dungan</b>	Guide Dog Association

#### Private Charitable Trust

<b>Duncan Leary</b>	The Australian Ballet
---------------------	-----------------------

## Vale Annie

Many readers may recall a significant book called 'Annie's Coming Out' which was published in 1985. It told the inspirational and shocking personal story of Annie McDonald, a St Nicholas' Hospital resident for 14 years. Sadly, Annie passed away on 22 October 2010.

St Nicholas Hospital operated between 1963 and 1985 and housed children with intellectual disabilities. State Trustees is custodian trustee for a charitable trust 'The St Nicholas Hospital Trust' that was set up for the general benefit of St Nicholas Hospital residents, and ex-residents now living in the community.

As we pay tribute to Annie, we are assisting the Managing Trustee, the Department of Human Services (DHS), to identify suitable recipients for trust funds. DHS is using its systems and networks to inform people. However, ex-residents living in the community may not have been contactable through this avenue.

There are significant funds available for distribution from the trust and it is important that ex-residents such as Annie have the opportunity to benefit from these funds.

If you know of anyone who has resided at St Nicholas Hospital in Drummond Street Carlton, you can find further information at [www.dhs.vic.gov.au/disability/building\\_better\\_communities/intellectual-disability-donations-trust](http://www.dhs.vic.gov.au/disability/building_better_communities/intellectual-disability-donations-trust).

## 'Doing it for themselves' Frankston Peninsula Carers

On 18 November 2010 Frankston Peninsula Carers launched its landmark affordable housing project, 'The Hastings Model'.

This is a unique development which will see the construction of 20 new homes that will offer low-cost, long-term rental housing for the elderly, and physically and intellectually disabled (with appropriate support). The site will include a home built by the Department of Human Services for 5 people with a disability offering 24 hour care. This co-location will enable older people to live in the same development alongside their sons and daughters who can receive appropriate care. The development will go a small way to solving the crisis in housing for adults with an intellectual disability.

State Trustees Australia Foundation granted \$7,500 to Frankston Peninsula Carers to purchase office equipment to effectively initiate this multi-million dollar project. The Carers is a small group of interested community members and parents who had become increasingly concerned about how their adult disabled children would manage in the future. In total \$550,000 was raised towards the project and the group is now working towards its next project.

**The Committee of Frankston Peninsula Carers celebrating the official "turning of the sod" of the Hastings Model on site in Marine Pde, Hastings:**



Left to Right:

Back: Norman Carlyon AM, Beryl Gibb, Jim Houlihan

Middle: Jan Earls (Sec) Maureen Bowler, Lis Maude (Treasurer), Rev Sue McPhee-Wright, Marj Ross (Vice President)

Front: Joy Jarman (President)

## Calls help those living alone

Telecross is a free national Red Cross service, providing daily telephone calls to check on the wellbeing of people who are at risk of an accident or illness that may go unnoticed, such as falling and being unable to call for help.

In December 2008 State Trustees Australia Foundation granted \$10,000 to this important service.

Every day when Victor (pictured) wakes up, he feels reassured that he will receive a phone call from a volunteer, checking to see if he is okay.

"After my wife died I decided to stay on in the house because of the memories and our love. It was lonely because I missed her very much. What I wanted was the sound of a human voice and I couldn't get that with any other service".

Telecross helps people retain their dignity and independence. Calls are made by trained volunteers at an agreed time that suits the recipient of the call.

If a call goes unanswered an emergency procedure will be activated and help arranged if necessary, which offers peace of mind to clients and their families.

Telecross allows people like Victor to stay connected with the outside world, providing a degree of companionship and lessening the sense of isolation many people experience.

If you would like to find out more information about Telecross, know someone who would benefit or if you would like to volunteer your time please visit [www.redcross.org.au/ourservices\\_acrossaustralia\\_communityservices\\_telecross.htm](http://www.redcross.org.au/ourservices_acrossaustralia_communityservices_telecross.htm).



Photo credit: Australian Red Cross/Helen White

## Contact us:

To talk to one of our charitable trusts consultants please call **9667 6740** or contact us at [CharitableTrusts@statetrustees.com.au](mailto:CharitableTrusts@statetrustees.com.au) Residents outside the Melbourne metropolitan area can call **1300 138 672** for the cost of a local call. Alternatively, you can visit our website at [www.statetrustees.com.au](http://www.statetrustees.com.au)

**State Trustees Limited**  
ABN 68 064 593 148  
AFSL N<sup>o</sup> 238037

(CharTrustsNews\_ed5-1210)

**Melbourne**  
168 Exhibition St  
Melbourne,  
Victoria, 3000

**Glen Waverley**  
Suite 22, Level 2  
40 Montclair Ave  
Glen Waverley,  
Victoria, 3150

**Dandenong**  
Shop 4, 157 Lonsdale St  
(corner of Foster St)  
Dandenong,  
Victoria, 3175

**Bendigo**  
74 Pall Mall  
Bendigo  
Victoria, 3550