

State Trustees offers a diverse range of professional products and services to help protect and grow your assets. We understand when it comes to trusting someone with your personal and financial affairs you need to know you're getting professional and expert advice with your interests at heart. This guide provides you with information about some of our services and the fees we charge. If you would like more information about all our services, fees and charges, please contact us on (03) 9667 6466 and our staff can explain these in greater detail or visit our website www.statetrustees.com.au.

The fees contained in this guide are made under the provisions of the Trustee Companies Act 1984 and the State Trustees (State Owned Company) Act 1994. The details of our fees are lodged with the Treasurer of Victoria and with the Director of Consumer Affairs Victoria and are published in the Victorian Government Gazette.

'Per Annum' is referred to throughout this document as 'p.a.'. All fees are inclusive of GST. The new fees and charges, and new rates for existing fees and charges, as set out in this Guide will (unless otherwise stated) be charged by State Trustees on and from 1 July 2011.

1. Travel (servicing Victoria only)

Travel* involved in providing service within Victoria may be subject to a fee	\$183 per appointment
* Travel involved in visiting a represented person for whom State Trustees acts as Administrator will not incur this fee.	

2. Interpreter Services

Where an interpreter service is required, a qualified interpreter (not a family member or friend) will need to attend the Will or Enduring Power of Attorney (EPA) appointment. This will ensure that any documents prepared accurately express the client's wishes. An interpreter may also be required at an appointment to discuss Estate, Trust, Attorneyship or VCAT-appointed administration issues, or to obtain Financial Planning or Taxation advice. State Trustees can provide details of recommended professional interpreting services on request. The Interpreter Service will need to be arranged prior to the appointment.	The interpreter service is arranged at the client's cost and, for Will or EPA preparation appointments, will be reimbursed on presentation of a receipt if State Trustees is appointed Executor, Co-Executor or sole Attorney. State Trustees may charge any interpreter costs for ongoing administration services (including Estate, Attorneyships, Trust or VCAT-appointed Administration issues, or for Financial Planning or Taxation advice) to the relevant estate, trust or client.
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3. Payment for Wills and Enduring Powers of Attorney Preparation

Will and Enduring Power of Attorney document preparation.	Payment is required for Will and Enduring Power of Attorney document preparation at the initial appointment time.
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4. Disbursements

State Trustees is generally entitled to reimbursement from the client/estate for disbursements it incurs in providing its services. These may include services contracted to professional organisations outside State Trustees (e.g. real estate agent fees charged on the sale of a property).	Disbursement charges include the cost of GST where applicable.
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5. Reduction or Waiver

State Trustees may reduce or waive its fees, commissions and charges at its discretion.

6. Hourly Fee

State Trustees has the discretion to negotiate an hourly fee for the provision of any of its services.

Except where stated otherwise, all hourly fees are taken on a pro-rata basis.

7. Advances

Where funds are advanced, State Trustees will fund expenses until the funds become available, or will fund for extraordinary expenses when necessary.

The interest charged for these advances is no greater than the interest rate fixed under Section 2 of the Penalty Interest Rates Act 1983, less 2.5%.

8. GST

If a service is provided under an existing agreement and the service is GST-free, the agreed charges for the service will remain unaffected by GST-related tax reform until the agreement is able to be reviewed by the parties, or until legislation or other regulatory change permits the adjustment of the charges.

Questions?

Call State Trustees

03 9667 6466

Residents outside the Melbourne metropolitan area can call

1300 138 672

or visit

www.statetrustees.com.au



A phone solution for people who are deaf or have a hearing or speech impairment

TTY users phone **133 677** then ask for 03 9667 6466

Speak and Listen users phone **1300 555 727** then ask for 03 9667 6466

Internet relay users connect via www.relayservice.com.au and ask for 03 9667 6466

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Melbourne Victoria 3000

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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

State Trustees aims to provide you with the best service at all times. If you have any comments on our service, or concerns, please contact the Client Relations Manager on (03) 9667 6200