

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 be charged by State Trustees on and from 1 July 2011.

1. Legal Services

State Trustees' Legal Services group provides the legal services set out below. State Trustees also has the option of obtaining legal services from external law firms as required. This can happen where State Trustees has insufficient capacity to deal with the particular legal task, or where the legal task is outside the range of legal tasks normally undertaken by State Trustees. If this work is outsourced to an external law firm, the fees charged by that law firm apply and are paid by the client. State Trustees does not add on any fee for the outsourcing of the legal task.

In its capacity as Executor, Trustee, Attorney or Administrator, State Trustees may need legal advice and representation to act in its clients' best interests. Litigation may be a necessary step in resolving legal issues affecting the affairs of State Trustees' clients. State Trustees will engage in many forms of alternative dispute resolution to resolve our clients' legal problems, however in some circumstances, litigation is the most appropriate way to protect our clients' interests.

Legal fees, for services such as document preparation, legal advice and litigation:

• Senior Lawyer	\$422 per hour
• Lawyer	\$319 per hour
• Junior Lawyer	\$194 per hour
• Articled Clerk/Para-Legal/ Law Clerk	\$183 per hour

Probate fees are legal fees that relate to obtaining formal authority to act in relation to a deceased estate. For example, where a person dies leaving a Will appointing State Trustees as Executor, State Trustees will usually be required to apply for a Grant of Probate from the Supreme Court to deal with the deceased person's assets and administer the estate.

Probate fees

Charged in accordance with current Supreme Court (Administration and Probate) Rules.

Conveyancing Fees are charged in relation to the legal activities required when dealing with real estate. Any disbursements involved are charged to the client.

State Trustees may need to sell or purchase a property.

• Sale or purchase of residential real estate	\$826* per sale/ purchase
• Sale or purchase of commercial real estate.	\$953* per sale/ purchase
• Sale or purchase of retirement village property.	\$1,073* per sale/ purchase

* Fee includes one Transfer of Land and one Discharge of Mortgage (but does not include the Sundries fee below).

1. Legal Services (continued)

Where the property concerned needs to be transferred to the beneficiaries or a third party.	Transfer of Land.	\$377
Caveats are registered on Certificates of Title to protect an interest in the property, e.g. as a life tenant in accordance with the terms of the Will. A caveat prevents the registered owner from dealing with the property without first obtaining the Caveator's consent.	Caveat or withdrawal of Caveat over property.	\$153
A discharge of mortgage is obtained from the Lender when the loan is discharged.	Arranging the discharge of the mortgage with the Lender.	\$189
When State Trustees is the Executor of an Estate, the property needs to be transferred to the Executor in order for the property to be sold or subsequently transferred to a beneficiary. In the case of a property owned by joint tenants a survivorship application may be required.	Application by Personal Representative or Survivorship Application.	\$189
Statutory Declarations may be required to support a property transaction, e.g. the owner's name differs on the certificate of title and on the Will and therefore a statutory declaration is required to clarify the client's true and correct name.	Supporting Statutory Declarations.	\$98
Obtaining a replacement Certificate of Title where the original has been lost, stolen or misplaced. This fee includes the provision for three statutory declarations ordinarily required for these applications.	Lost Title Application.	\$1,054
State Trustees may be required to formally issue a Notice of Rescission where the sale or purchase of real estate is cancelled during the period of the contract of sale.	Notice of Rescission.	\$371
State Trustees charges a once-off flat fee for all sundries – e.g. photocopying, faxing, binding of contracts, postage, etc.	Sundries.	\$28 per matter (flat fee)
Where State Trustees is required to provide a Certificate of Title and/or miscellaneous document to a third party to facilitate a property transaction. (This fee is paid by the party requesting the documents.)	Production of Certificate of Title or other documentation for a third party.	\$77 per document
	Any other Conveyancing Service not listed above.	\$183 per hour or as otherwise agreed

Call State Trustees on **9667 6050**. Residents outside the Melbourne metropolitan area can call **1300 138 672** or visit **www.statetrustees.com.au**

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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