

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. The fees in this Guide relate to document preparation only. For fees and charges relating to State Trustees' administration, refer to the following Guides:

- Guide to Services, Fees and Charges for the Administration of Estates
- Guide to Services, Fees and Charges for the Administration of Enduring Power of Attorney (Financial)

1. Will Preparation

State Trustees is one of the largest Will-preparation organisations in Victoria, with over 65 years' experience in preparing Wills for adult Victorians.

| | If State Trustees is appointed Executor (sole) or Co-Executor: | If State Trustees is not appointed Executor (sole) or Co-Executor: |
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| Individual Rate | \$183 per hour* | \$306 per hour* |
| Rates for individuals 75 years of age and over | \$50 per person | \$306 per hour* |

*Minimum charge is one hour

2. Enduring Powers of Attorney Preparation

State Trustees provides the following Enduring Power of Attorney services:

- the preparation of Enduring Power of Attorney documents; and
- the administration of an Enduring Power of Attorney (Financial) where State Trustees acts as Attorney. For fees and charges relating to State Trustees' administration, refer to the 'Guide to Services, Fees & Charges for the Administration of Enduring Power of Attorney (Financial)'.

| (i) Preparation of Enduring Power of Attorney (Financial) | If State Trustees is appointed sole Attorney or sole alternative Attorney where the primary Attorney is a spouse/partner: | All other Attorney appointments: |
|---|---|----------------------------------|
| Prepared but not activated immediately: | | |
| • Individual | \$61 per person | \$130 per person |
| Prepared and activated immediately: | | |
| • Individual Rate | Nil | Rates as above |
| (ii) Preparation of Enduring Power of Attorney (Medical Treatment)[†] or Enduring Power of Guardianship[†] | \$83 per Enduring Power of Attorney (Medical Treatment) or Enduring Power of Guardianship | |
| • Individual Rate | | |

Notes: † State Trustees will not act or accept appointment as an Agent under an Enduring Power of Attorney (Medical Treatment), nor act or accept appointment as an Enduring Guardian under an Enduring Power of Guardianship.

2. Enduring Powers of Attorney Preparation (continued)

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| (iii) Preparation of Enduring Power of Attorney (Financial), Enduring Power of Attorney (Medical Treatment) and Enduring Power of Guardianship – Package Pricing <ul style="list-style-type: none">• Individual Rate | If State Trustees is appointed sole Attorney or sole alternative Attorney* for the Enduring Power of Attorney (Financial): \$165 per person |
| *Where the primary Attorney is a spouse/partner | |

3. Travel Fee

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|---|------------------------------------|
| Travel involved in visiting the client. | \$183 per appointment [‡] |
| [‡] Travel Fee for visiting any client aged 80 or over at any venue other than a State Trustees office incurs no charge. | |

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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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