



state  
trustees  
your interests at heart

## State Trustees can help ease the burden



For over 70 years State Trustees has been caring for the personal and financial well-being of many Victorians.

When Eileen was initially diagnosed with dementia, she didn't know how she was going to cope.

She had always prided herself on her independence, but now she was starting to wonder how she would look after her finances.

A friend suggested she get in touch with State Trustees to help her find ways to manage her money when she was no longer able to.

### Simple solutions for your finances

We offer simple solutions for your financial future, giving you peace of mind so you can look after your health and spend time with your family and friends.

After assessing your circumstances, our caring professionals can provide you a personal solution that is best for your needs.

When Eileen came to us for help, she wanted to put her money away now as well as protect her assets from potential claims, so she and her family didn't have to worry in the future.

We helped Eileen create an Inter-vivos Trust with herself as the principle beneficiary. She was able to specify her wishes regarding how her money will be used.

She nominated State Trustees as Trustee and we prepared a financial plan and set up fortnightly payments to her bank account. When she wanted to travel to England to visit her brother who she hadn't seen for twenty years, we were able to help.

With State Trustees, she could be confident that the burden and worry of administering her affairs would be taken care of by a dedicated team of professionals.

### My Story

“I was wondering what was happening to me, so in a way, it's a relief to know. Of course I'm worried about my future but, with my husband, am trying to just take one step at a time to plan for it.”

Carol, 58, recently diagnosed with younger onset dementia.

“Families of our clients often tell us that knowing we’re looking after their relative’s bills and finances gives them such peace of mind.”

State Trustees Attorneyships consultant.

“People are always so relieved to have found a simple solution to aid in their financial future.”

State Trustees Trust consultant.

The case studies, while fictional, are based on real client experiences. Names and identities of persons and facts have been changed in order to protect confidentiality. Any similarity between a person’s name and experiences to the scenario described in the case study is unintended and coincidental.

## It’s never too early to start planning for the future

Another way we can help is through an **Enduring Power of Attorney (Financial)**.

When Bill was initially diagnosed with dementia he created and activated an Enduring Power of Attorney (Financial) to help organise his financial needs. Bill did not want to burden his family and appointed State Trustees to act as his Attorney.

Bill gave instructions to State Trustees on how he would like his financial and legal affairs managed.

As Bill’s Attorney, State Trustees has the skills, knowledge and time to manage his affairs, such as payment of accounts and bills, liaising with Centrelink on entitlements, protection of his assets and any complex financial affairs.

Bill has peace of mind that his finances are being managed by professionals so he can spend his time with those close to him.

## Important decisions at a difficult time

State Trustees can guide you through the important legal and financial decisions for you and your family.

We are a state-owned company that has been providing Trustee, executor and personal financial administration services in Victoria for over 70 years.

Our professional consultants can give you expert advice on finance, taxation, law, investment, welfare services and trust administration.

We manage the ongoing affairs of thousands of Victorians on a daily basis, providing professional and expert advice with our clients’ interests at heart.

### Questions?

Call State Trustees

**03 9667 6466**

Residents outside the Melbourne metropolitan area can call

**1300 138 672**

or visit

[www.statetrustees.com.au](http://www.statetrustees.com.au)



This brochure has been prepared for general information only and not as specific advice to any particular person. Its contents are of a broad nature and are not intended to provide a comprehensive treatment of the topics addressed. You should seek professional advice in relation to any information contained in this brochure prior to acting upon its content.