



How we help protect the community

Will Preparation / Executor Services / Trusts / Financial Services / Taxation Services / Genealogical Services
Investment Services / Enduring Power of Attorney / **Personal Financial Solutions**



At State Trustees we understand when it comes to trusting someone with your financial affairs you need to know you're getting professional and expert advice with your interests at heart.

We've been helping Victorians with their financial needs for over 70 years so they can make the most of their opportunities. State Trustees offers a diverse range of professional products and services to help protect and grow your assets.

Protection you can trust

At State Trustees we have been helping people protect and manage their finances for over 70 years. We provide our legal and financial assistance to all Victorians regardless of their background or their personal situations.

An important part of what we do is protect and support vulnerable members of our community. We currently look after the financial and legal affairs of almost 9000 Victorians with a disability, illness or injury who are unable to fully manage their own affairs.

When the Victorian Civil and Administrative Tribunal (VCAT) appoints us as Administrator of your affairs we help ensure your income from whatever source is protected or used for your ongoing needs and wellbeing.

How does VCAT work?

The Victorian Civil and Administrative Tribunal is an independent government body. If they determine that you are unable to look after your own finances and might be vulnerable to exploitation they may appoint State Trustees as your Administrator.

Following this appointment we will be responsible for looking after your financial interests and making decisions that are in your best interests.

Once appointed we have a duty to manage your finances fairly and impartially – a job we take very seriously. No matter what your circumstances, you can rest assured that we are there for you.

Our appointment is usually reviewed by VCAT every three years to make sure your needs are being met and to decide if you still need our help.

My Story

Bill is a young man with a mental illness who was living in a park in Melbourne's northern suburbs.

One day police found him in a comatose state and he was admitted to hospital.

When Bill was referred to us, we found he hadn't received any Centrelink entitlements for three years. State Trustees helped him receive a back-payment of \$34,000.

Bill is now living in supported accommodation and is linked with a local community mental health service.

The case study, while fictional, is based on real client experiences. The name and identity of the person 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.

Looking after your interests

State Trustees as your Administrator

Having financial control of your life is important. So when we are appointed as your Administrator it is natural that you might have questions about how your life could change.

Here's how we can help you:

- Make sure all your income is collected
- Identify any other sources of income for you, including Trusts or other entitlements
- Develop a budget to give you as much financial independence as possible
- Make regular funds available for your personal expenses
- Organise settling of your debts
- Arrange the recovery of money owing to you
- Pay your ongoing bills such as rent, electricity and phone
- Insure your property and belongings
- Settle outstanding legal issues
- Keep accurate and clear records
- Prudently manage your assets and investments

Experienced people to look after your affairs?

When State Trustees is appointed to look after things for you we introduce you to our dedicated consultants. That way you have a direct contact in our organisation, someone who knows you and your situation. They have been chosen because of their experience in legal and financial matters and will make decisions with professionalism, understanding and only your best interests in mind.

What about fees?

State Trustees' fees and charges are set in accordance with government legislation. A Guide to Services, Fees and Charges is available upon request.

Questions?

To discuss your situation, VCAT, the appointment of an Administrator or our fee structure, call State Trustees

03 9667 6788

Residents outside the Melbourne metropolitan area can call

1300 138 672

or visit

www.statetrustees.com.au





03 9667 6444

Residents outside the Melbourne metropolitan area can call

1300 138 672

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