



## Personal Financial Solutions introduction

Answering the important questions about State Trustees' administration services for Represented Persons.



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

### Who is State Trustees?

State Trustees is a State-owned trustee company, specialising in providing you with legal and financial assistance.

### What does State Trustees do for you?

- State Trustees will manage your financial and legal affairs
- We will involve you in the decision making process to arrive at the best possible outcome.
- In order to provide you with the best service, State Trustees will establish a record of your finances.
- We will consider all requests relating to your financial and legal needs. All requests will be assessed to make sure that your financial security comes first. State Trustees may refuse a request if it is not in your best interests. If this happens, every effort will be made to find a way to meet your needs.
- State Trustees will assist you in managing your financial and legal affairs by:
  - Making sure that any pension entitlements are collected on your behalf
  - Trying to identify and collect income on your behalf if you are entitled to other income from another source
  - Discussing your banking needs with you and arranging for funds to be made available for your personal expenses
  - Contacting creditors to discuss repayment if you have any outstanding debts
  - Contacting debtors regarding recovery of the debt if you are owed money

- Requesting, where relevant, various companies such as utilities to send your bills directly to us for payment
- Making sure that your property is insured and that all relevant expenses including rates are paid if you own your own home
- Investigating and attempting to resolve any unsettled legal issues as efficiently as possible  
Legal proceedings may take a long time to resolve, depending on the complexity of the issue
- State Trustees is unable to act for you to resolve any social, accommodation or medical issues you may have, or represent you in reviewing a Victorian Civil & Administrative Tribunal (VCAT) Order

While we will make every effort possible to accommodate all your requests, our primary concern will always be to ensure your financial security and legal welfare.

### Who will be helping you?

State Trustees' experienced consultants  
Our consultants will be responsible for the initial establishment of your file and the ongoing management of your legal and financial affairs.

The consultants are experienced in legal and financial matters, and where appropriate, will engage the services of State Trustees' panel of taxation accountants, financial planners and solicitors in the administration of your affairs.

State Trustees has a legal obligation, as your administrator, to do a number of things on your behalf, which you would have done for yourself in the past.

Upon receipt of the VCAT Order, our consultants will commence the administration of your affairs. At times, delays may occur while other parties/ organisations update their records to recognise State Trustees as your administrator.

## Client Relations Consultants

You may have contact with our Client Relations Consultants (CRCs) at various stages during our administration. The main role of CRCs is to visit and consult with new clients to assist with preparing a budget, identifying issues, and considering future goals. In addition to this, they can help to resolve concerns and assist with providing solutions to sensitive or complex financial issues.

## What about fees?

### Fees

State Trustees charges fees for the administration of your affairs. Fees are outlined in the "Guide to Services, Fees & Charges" brochure, which is also included in this pack. State Trustees will assess your financial situation and, in some cases, fees may be waived. A Client Relations Consultant will be able to discuss this with you if you wish.

## Statements

You are entitled to request a copy of the Statement of Financial Account that summarises your financial transactions for the current financial year to date.

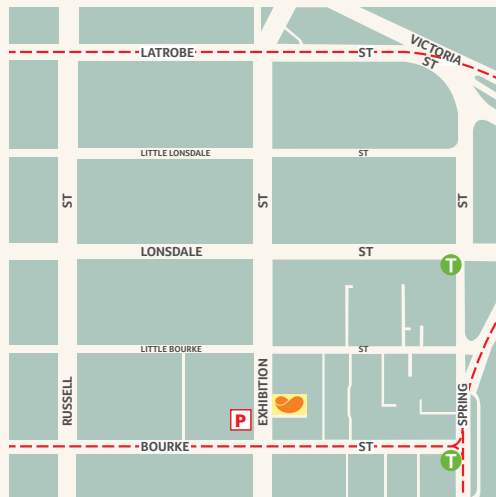
## Resolving concerns

State Trustees is committed to providing the highest level of service to achieve the best outcome for you. However, from time to time you may have some concerns. This pack includes a brochure entitled "Resolving Concerns", which outlines the steps you can take if you have any concerns.

## Contact us

If you have any queries in relation to Personal Financial Solutions, please call State Trustees on 03 9667 6788 or 1300 138 672 (local call cost outside the metropolitan area), or email [pfs@statetrustees.com.au](mailto:pfs@statetrustees.com.au). All correspondence by post, fax or email should include your Name, Reference Number and Contact Details.

## State Trustees' Locations



**Head Office:**  
168 Exhibition St, Melbourne

Melways Map 2F Ref H2  
(near the corner of Bourke St)



**Customer Service Centre:**  
593 Little Bourke St, Melbourne

Melways Map 1A Ref C5  
(near the corner of King St, entry on Little Bourke St)

### Map symbols



State Trustees



Trams



Car park



Train Station exits

## Questions?

Call State Trustees

**03 9667 6788**

Residents outside the Melbourne metropolitan area can call

**1300 138 672**

or visit

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

