

How can we help?



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

In the event that a client passes away, State Trustees' Executor Services team can finalise their affairs and administer their estate. We can also support their family during this difficult time.

The benefits of working with State Trustees

We can:

- relieve the burden of estate administration from your client's Executor
- help your client's family with the funeral arrangements
- arrange to collect your client's belongings and personal effects promptly
- provide the family with assistance in situations where a Will cannot be located
- locate next-of-kin through Australia's largest probate genealogy team

Your State Trustees Service Team

When	Who	How
You would like to refer a client or Executor to us or arrange a visit	Business Alliance Managers Vicky Triantaflaros Laura Mazzone	03 9667 6897 03 9667 6011
General enquiries	New Business Co-ordinators Nancy Du Debbie Johnstone	03 9667 2884 03 9667 2852
Queries, compliments or anything else	Distribution Manager Mary Amerena	03 9667 6024

Working with you to support your clients with their finances

Client requires assistance with their financial affairs

Does the client have capacity?

YES

NO

Does the client have an existing Enduring Power of Attorney (EPA) [Financial] with State Trustees as Attorney?

YES

NO

Contact: Business Development Team
03 9667 6165

- 1 To arrange a confidential visit for the client to discuss their needs.
- 2 To enable the client to sign a new EPA [Financial] or activate an existing EPA.
- 3 If State Trustees is appointed Attorney, to discuss the procedure and take instructions from the client regarding the management of their financial affairs.

Contact: Client Relations Team
03 9667 6450

- 1 You can apply to Victorian Civil and Administrative Tribunal (VCAT) for Administration and/or Guardianship.
- 2 VCAT will schedule a hearing.
- 3 Where State Trustees is appointed we will administer the client's finances as per the Administration Order made by VCAT.

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We can...

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- ✓ help your client's family with the funeral arrangements
- ✓ help ensure your client's belongings and personal effects are collected promptly
- ✓ provide the family with assistance in situations where a Will cannot be located
- ✓ locate next-of-kin through Australia's largest probate genealogy team