

At State Trustees 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.

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.

Here for all Victorians

At State Trustees we know that when it comes to trusting someone with your personal and financial affairs, you need to know that you are getting professional and expert advice that has your interests at heart.

We've been helping Victorians protect and manage the important things in their lives for over 70 years, providing expert financial and legal assistance to all Victorians regardless of their personal circumstances.

We're well known as specialists in preparing Wills and we offer a diverse range of professional services, including deceased estate administration, Trustee, Executor and Attorney services, along with astute financial advice and management – all aimed at helping protect and build your assets.

We believe every Victorian deserves access to expert support they trust. That's why we care for people in the community who are unable to look after their own financial affairs. We aim to provide our services with empathy and understanding, with our clients' interests at heart.

Here to help with Will preparation

By helping prepare your Will we give you peace of mind and make things easier for your loved ones when you die. Wills are really important for making your wishes known to everyone, especially when it comes to your assets. Our expert legal team ensures your Will is clear, up-to-date and legally robust so your wishes are clearly expressed and understood.

Here to help as the Executor of your Will

Our deceased estate services can make things simple for grieving friends and family. Choosing the right Executor to manage your estate and distribute assets according to your wishes can be complicated and stressful. By nominating us as your Executor, you ensure your estate administration is in the hands of professionals with expertise in the range of financial, legal and taxation issues that may arise. And because we are impartial everything we do is with your interests at heart.

Here to help manage deceased estates

Trying to manage a loved one's estate while you're grieving can be daunting – not to mention onerous. As one of Victoria's largest and most experienced administrators of deceased estates we are here to help. If your loved one has left a Will naming you as Executor, and you have not accepted the role or done anything to administer the estate, you can appoint us before applying for Probate and we can take care of everything, including protecting assets and handling all complex financial and legal issues that may arise. Rest assured we will manage the estate professionally, with impartiality and empathy, with a focus on distributing the assets according to your loved one's wishes. When someone dies without a Will and the next of kin need to be found, that's where we come in. We have Australia's largest Probate Genealogy team, who are experts in tracing families back generations, here and overseas.



Here to help with Enduring Powers of Attorney

An Enduring Power of Attorney (Financial) is a legal document that gives a trusted relative, friend or organisation the authority to make legal and financial decisions on your behalf – either immediately or to take effect when needed in the future. At State Trustees we can help take the worry out of choosing an Attorney. By acting as your financial Attorney we can manage your day-to-day affairs when you cannot, or choose not to. We have experience helping people maintain their lifestyle over long periods of time. As a state-owned company we are steadfast and secure. We will look after your financial affairs with professionalism and expertise and, unlike most individuals, we are audited regularly.

State Trustees can also assist by preparing an Enduring Power of Attorney (Medical) so you can nominate a person to make medical decisions on your behalf, and an Enduring Power of Guardianship so that you can authorise a person to make personal and lifestyle decisions on your behalf.

Here to help administer Trusts

We help Victorians by acting as professional Trustees. A Trust can be an ideal way to protect money or assets for beneficiaries. A Trust can also be established to benefit charities, including through the State Trustees Australia Foundation. The role of Trustee requires a unique set of skills, including some financial expertise and administrative skill, and can literally last a lifetime. As Trustees we offer all the security that comes with being state-owned and draw on our expertise in tax, law and financial management to provide you with confidence and reassurance.

Here to help plan your finances

State Trustees assists Victorians in creating, protecting and sharing their wealth. We help you make the most of opportunities with careful planning and astute investment advice. Our Financial Planning specialists can help you meet your financial goals, whether you are saving for a first home, educating your children, looking to create extra wealth, planning retirement, moving into care accommodation or any combination of these. And as a registered tax agent we can prepare tax returns for you, your business, company, partnership or super fund. Our InveST Funds can also help you build wealth. Together with prudent investment advice, our funds, which include shares and property, can be tailored to your needs.

Here to help the Community

As Victoria's state-owned Trustee company we are dedicated to providing financial services to vulnerable Victorians. Appointed by VCAT, we act as Administrator for nearly 9,000 people with disability, illness and injury who need help managing their financial affairs. We make financial decisions on their behalf with impartiality and understanding, so they can rest assured that we have their best interests in mind. We are proud of our reinvestment in the community, grants, sponsorships and partnerships.

70 years
helping all
Victorians

Helping you

At State Trustees our wholehearted approach is unique. Because we're owned by the state of Victoria and also compete in the commercial world, you can be sure we are reliable, trustworthy and professional while providing competitive products and services. Unlike individual Trustees and Executors our company never goes on holidays, retires or falls ill. When we help out as Executor, Attorney or Trustee, we always have your best interests in mind.

Drawing from over 70 years' experience of helping Victorians from all walks of life, we're here for you – either in our Melbourne offices or through scheduled visits to regional and rural areas, providing you with continuous support and assistance.

Questions?

Call State Trustees

03 9667 6466

Residents outside the Melbourne metropolitan area can call

1300 138 672

or visit

www.statetrustees.com.au

