



# Resolving concerns

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

For more information on State Trustees  
Call 03 9667 6868  
email [info@statetrustees.com.au](mailto:info@statetrustees.com.au)  
or go to [www.statetrustees.com.au](http://www.statetrustees.com.au)



## Resolving concerns

State Trustees is committed to customer service – your concerns are therefore very important to us.

If you have experienced a problem in dealing with State Trustees Limited (State Trustees) or would like to suggest ways to improve our customer service or products, please contact us.

To express your concerns or provide suggestions you can either contact us by telephone, email, facsimile, or in writing. Alternatively, you may wish to contact us to arrange an appointment to discuss the matter.

To ensure your concerns are resolved quickly and efficiently, we suggest the following approach.

### Contact a Consultant or Representative

In many cases, our consultants can provide you with an immediate answer to your concern. Therefore, please contact them first and gather all relevant information that may help to clarify the situation.

If the consultant or representative cannot resolve your concern immediately, they will investigate in a timely manner and provide a response as soon as possible.

### Contact a Team Leader

If you are dissatisfied with the response you have received from the consultant or representative, you can request that their Team Leader address your concern.



## Contact a Manager

In the unlikely event that your concern remains unresolved, you should request it be addressed by a manager, who will investigate the issue and attempt to resolve it.

## Role of the Client Concerns Manager

If you feel that the Manager has not provided you with a satisfactory response, you should contact our Client Concerns Manager.

The Client Concerns Manager is responsible for ensuring that all customer concerns are investigated in an independent and timely manner.

## State Trustees' Service Standards

State Trustees will acknowledge your complaint promptly upon receipt. State Trustees is committed to responding to your written concerns within ten working days of receipt of your letter, and your verbal concerns within three working days.

Investigation of a concern may require additional time to ensure a thorough investigation. You will be informed when a response can be expected, or advised of any delays.



## Contacting State Trustees

Please provide your name, relevant reference number and contact details when contacting us.

We can be contacted via:

- Telephone 03 9667 6466
- Outside metropolitan area 1300 138 672 (local call cost)
- Fax 03 9663 4260
- Website [www.statetrustees.com.au](http://www.statetrustees.com.au)

State Trustees' Client Concerns Manager can be contacted at:

- 168 Exhibition Street, Melbourne, Victoria 3000
- Telephone 03 9667 6200
- Outside metropolitan area 1300 138 672 (local call cost)
- Fax 03 9667 6404
- email: [clientrelations@statetrustees.com.au](mailto:clientrelations@statetrustees.com.au)

## Other dispute resolution options

We expect that our consultants, managers or Client Concerns Manager will completely resolve your concern.

However, if you believe your concern has not been satisfactorily dealt with, or it has not been resolved within 45 days, there are alternative resolution processes available.

For some of State Trustees' services, there are specialist contacts you can get in touch with. We have set out some key ones below:

- Residents Trust Fund

If you are a client of the **Residents Trust Fund (RTF)** you can contact:

Department of Human Services  
Client Funds Management Team

- Telephone 03 9616 7777

- VCAT Guardianship List

If your concern relates to a matter dealt with by the **Guardianship List** of the Victorian Civil and Administrative Tribunal (VCAT), such as actions taken under an administration order or an enduring power of attorney, and you feel that your concerns have not been adequately addressed, you can also contact:

VCAT – Guardianship List

- Telephone 03 9628 9911
- Outside metropolitan area 1800 133 055 (toll free)

### Ombudsman

State Trustees is subject to the Ombudsman Act 1973. If we have not been able to resolve a concern you have about State Trustees or its services, you can ask the Ombudsman to look into it, by contacting:

The Ombudsman Victoria

- Level 3, 459 Collins Street, Melbourne, Vic 3000
- Telephone 03 9613 6222
- Outside metropolitan area 1800 806 314 (toll free)

### Quick Reference

**How can I contact State Trustees about a concern I have?**

**General:**

- Telephone 03 9667 6466
- Outside metropolitan area 1300 138 672 (local call cost)
- Fax 03 9663 4260

**Client Concerns Manager:**

- Telephone 03 9667 6200
- Outside metropolitan area 1300 138 672 (local call cost)
- Email [clientrelations@statetrustees.com.au](mailto:clientrelations@statetrustees.com.au)
- Fax 03 9667 6404

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.

### **State Trustees Limited**

ABN 68 064 593 148

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Melbourne Victoria 3000

Suite 22, Level 2, 40 Montclair Avenue  
Glen Waverley Victoria 3150

Shop 4, 157 Lonsdale Street,  
Dandenong Victoria 3175

74 Pall Mall  
Bendigo Victoria 3550

Phone 03 9667 6466

Fax 03 9663 4260

Outside metropolitan area  
1300 138 672 (local call cost)

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



A phone solution for people  
who are deaf or have a  
hearing or speech impairment

**TTY users** phone **133 677** then ask for 03 9667 6466

**Speak and Listen users** phone **1300 555 727**  
then ask for 03 9667 6466

**Internet relay users** connect via  
[www.relayservice.com.au](http://www.relayservice.com.au) and ask  
for 03 9667 6466