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Welcome to our latest edition of Status

The last year has been one of the most exciting in State Trustees' 70-year history.

We recently opened a new office, in the heart of Dandenong. This move brings us closer to our clients, and the community - and makes it easier to access our financial and legal services.

You will also have noticed our new look. State Trustees aims to become more relevant, valued and accessible to the Victorian community and this fresh new look and feel reflect this objective. By standing out and being relevant we can reach and support even more Victorians. We have also updated our website and encourage you to have a look at www.statetrustees.com.au.

At State Trustees we continue to provide professional help that is always with your interests at heart. In this edition you will find articles on some of the expert services and advice we are renowned for, including Executor Services, Wills, Trusts, and Personal Financial Services.

I hope you enjoy this fresh, new issue of Status. We are keen to hear your feedback and suggestions so please contact us on (03) 9667 6081 or email customermarketing@statetrustees.com.au.

Kind regards,

Anthony G Fitzgerald
Managing Director

State Trustees is coming to Bendigo!
Our new office at 74 Pall Mall will be opening in October.

State Trustees connected10™

State Trustees connected™ is a highly celebrated art exhibition and art prize open to Victorians with a disability or an experience of mental illness

The exhibition of selected works will be held at Melbourne Central, La Trobe Street, Melbourne from Friday 13 August until Thursday 26 August 2010. connected10 is an art exhibition and art prize open to Victorians with a disability or an experience of mental illness.

The winners of the State Trustees connected10 prizes will be announced at the exhibition opening on 13 August.

The connected exhibition is in its eighth year and will award prizes to the value of \$750, \$550 and \$250. The Allan Merigan 'People's Choice' award will be awarded for the second year.

Further details can be obtained on State Trustees' website www.statetrustees.com.au.





Financial services that help people get the most out of life

State Trustees looks after the financial and legal affairs of nearly 9000 Victorians with a disability, mental illness or injury. It is an important part of what we do at State Trustees, we're proud of the work we do with these clients and we take our role very seriously.

Jason* is a young Victorian living with a mental illness. He became our client after police found him in a catatonic state and took him to a local hospital. His illness meant that he was unable to fully manage his own affairs so we were appointed through the Victorian Civil and Administrative Tribunal to manage his final affairs for him.

When our consultant met with Jason they discovered he had been living in a park in Melbourne's northern suburbs and consequently had not been receiving his Centrelink entitlements. One of the first things we did was help Jason receive a back payment of \$34,000.

Jason now lives in comfortable supported accommodation and enjoys the assistance of a local community health service. We continue to help him with his financial affairs, making sure that his income is protected and goes towards his day-to-day needs and ongoing wellbeing.

When we protect and help vulnerable members of the community, we identify and collect their income sources, pay ongoing bills and manage any legal or creditor issues.

Our aim is to give clients like Jason as much financial independence as possible so they enjoy the same choices and options as everyone else, and make the most of their opportunities.

*the name and identity of the person and facts have been changed to protect confidentiality.



Our new Dandenong office makes life easier for more Victorians

In April we opened a new office, located in the heart of Dandenong. This state-of-the-art office brings us closer to our clients in Dandenong and the surrounding community. Dandenong has one of the fastest growing populations in Melbourne, and we're growing with it. Our Dandenong office will help us better support our existing clients, and help more people make the most of their financial opportunities and manage life's challenges.

Most of State Trustees employees at the new office live within 10km of Dandenong so their professional expertise is backed by a sound local knowledge. Living closer to work benefits our staff too, reducing their travel time and improving their work-life balance.



State Trustees – Your interests at heart

You will have noticed we have a new look and feel.

The introduction of our new brand is an important step in the evolution of State Trustees. It signifies our commitment to be more relevant and engaged with the community and our clients – moving closer, both in location and in understanding our clients' needs.

The new brand's modern appearance coincides with State Trustees' determination to be recognised as a modern and professional organisation, and aligns with an improved awareness and perception of how we can support the Victorian community.

By being relevant, valued and accessible more Victorians will understand our role in the community and when they can turn to us for help.

Our new logo has not changed our core purpose – to help Victorians with their financial needs so they can make the most of their opportunities.

State Trustees still has your interests at the heart of everything we do. We provide professional services with the understanding and compassion, honesty and integrity that all Victorians deserve, no matter what your circumstances.

www.statetrustees.com.au

Take some time to visit our new website! We have updated it to provide you with more, relevant and up to date news and information



We can help you take care of your loved one's estate



Coping with the loss of a loved one can be difficult enough without having to finalise their affairs as well. Especially if you're not an expert in business, law or finance. That's where State Trustees can help. As Victoria's leading estate administrators, we can help take care of everything according to your loved one's wishes and in the best interests of their beneficiaries.



For more information call our estate specialists
03 9667 6081
or visit statetrustees.com.au

How we can help

Financial and legal decisions

An Enduring Power of Attorney (Financial) is a legal document that allows you to nominate a trusted friend, relative or organisation to make financial and legal decisions on your behalf. At State Trustees we can help take the worry out of choosing an Attorney. By acting as your Financial Attorney we can help manage your day-to-day affairs when you cannot, or would prefer not to.

Astute Investment advice

Financial planning is just as relevant for young people as retirees; it's about creating wealth as well as protecting it. So if you're looking to buy a home, go on vacation or educate your children then we can help. Whatever your age we offer astute investment advice and planning so you can make the most of your financial opportunities.

An impartial Executor

Choosing the right Executor is a serious decision. Naturally you think of trusted friends and close family. But things may be difficult enough when grieving for a loved one without the added burden of managing an Estate. That's where we come in. As your Executor you can rest assured we will act impartially and in the best interests of your beneficiaries.



Your legacy

As a grandparent you may want to provide some sort of legacy for your grandchildren. Assets that are protected and managed for their benefit, now or after you pass away. We have had 70 years experience in setting up Trusts, as well as managing them according to the wishes of our clients.



A clear and legally sound Will

At State Trustees we can help you prepare or update your Will. Naturally, families and relationships change. There are marriages, divorces, separations, births and deaths. Life happens and it's important your Will keeps up with these changes and reflects your current situation

Through a clear and legally sound document we provide you peace of mind that your Will accurately reflects your wishes.

Estate administration expertise

Parents often nominate their adult children as the Executor in their Will. They may seem like a natural choice but this task can be daunting and extremely time-consuming. Ideally Executors should have experience in finance, law or business. State Trustees can help. As Victoria's leading estate administrators, we have all of this expertise under one roof.

Taking care of your financial and legal rights as you age.

Ensuring that decisions are made with your interests at heart



A new research report prepared by Monash University and commissioned by State Trustees has found that older people are more likely to be a victim of financial abuse perpetrated by their children than individuals they don't know.

You can help to protect yourself by preparing an Enduring Power of Attorney (Financial), a legal document that allows you to nominate a trusted friend, relative or organisation to make financial and legal decisions on your behalf.

At State Trustees we can help take the worry out of choosing an Attorney. By acting as your Financial Attorney we can help manage your day-to-day affairs when you cannot, or would prefer not to. We have been around for over 70 years and have experience helping people maintain their lifestyle over long periods of time.

As your Financial Attorney we aim to protect your interests and preserve your assets. We offer a comprehensive service designed to make your life secure, simple and give you peace of mind.



For more information about an Enduring Power of Attorney (Financial) or to make an appointment with one of our experts, call State Trustees.

03 9667 6081



State Trustees Charity Ball 2010

State Trustees Charity Ball 2010 was held on Saturday 26th June and was a night to remember for the more than 400 guests, employees and friends of State Trustees who attended.

State Trustees once again selected Alzheimer's Australia Vic as its charity partner for the ball. More than \$65,000 was raised and these funds will be used to support Alzheimer's Australia Vic's Volunteer recruitment and training program. It was a fantastic outcome and State Trustees acknowledges and thanks everyone who supported the evening.

The evening was attended by PJ Lane, son of Melbourne entertainment icon Don Lane. PJ is a keen supporter of the work of Alzheimer's Australia, and spoke about his very personal experience of Alzheimer's Disease and his memories of his father. PJ is an up-and-coming entertainer in his own right and also entertained guests with a couple of songs.

To find out more about Alzheimer's Australia Vic, visit: www.alzheimers.org.au

We would like to extend our sincere appreciation to all of our sponsors, especially our Premium Partners; **Abbeys Auctions, Burnham Real Estate, Maurice Blackburn Lawyers and Response Cleaning.**

A new way to protect your inheritance

When a loved one leaves something to you, it is often unexpected. Not something you necessarily plan for. If you are a beneficiary, State Trustees can help you make the most of your inheritance.

With our new 'My Inheritance' product you can honour the memory of your loved one by protecting and growing the assets left to you. 'My Inheritance' provides Will and Enduring Power of Attorney preparation, ongoing financial planning and support as well as tax advice – all from one team of experts. 'My Inheritance' makes managing your inheritance simpler and more cost effective.

You can choose from three 'My Inheritance' plans: Advantage, Assurance and Protection, depending on your needs, and can save up to 25% on our services. For the ultimate in ease we can also arrange for the cost of your preferred plan to be paid directly from your inheritance.



My Inheritance: How we can help you make the most of your inheritance

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



How old is your Will?

If your Will is more than 2 years old, it may need updating.



Many common events in life can mean you need to change your Will – such as buying a home, birth of a child or grandchild, or marriage. It is important that you review your Will regularly to ensure that it reflects your current circumstances.

How can State Trustees help?

- State Trustees has more than 70 years experience in preparing Wills and Powers of Attorney
- Our specialists will prepare your Will to ensure it clearly reflects your wishes
- State Trustees provides professional and expert advice with your interests at heart
- We offer FREE lifetime secure storage of your Will



To make your appointment or for more information, call

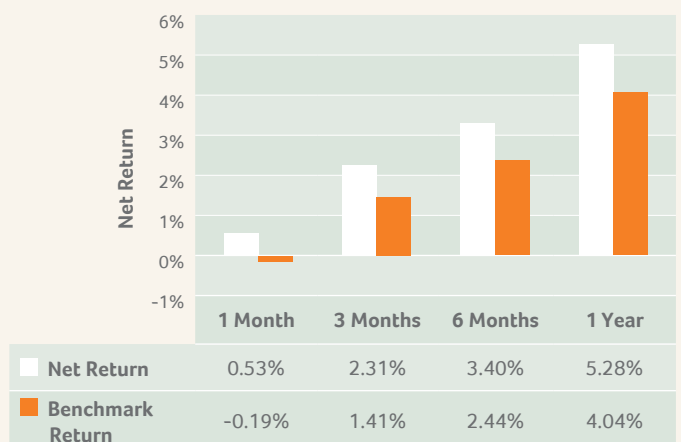
03 9667 6081

Outstanding performance - State Trustees Investment Services

State Trustees offers a range of investment options through our inveST Funds, which provide a number of investment options for investors ranging across the main asset classes. The inveST Funds are managed via a multi-manager approach. This approach which minimises many of the risks common to a single-manager fund.

At 30 April 2010 the inveST Diversified Income Fund and the inveST International Equity Fund have outperformed their benchmarks (net of fees and expenses) over the last 12 months. For detailed performance of all inveST Funds please go to: www.statetrustees.com.au/financial-services/investment-services, or contact our investments team on 9667 6421.

InveST Diversified Income Performance (as at 30 April 2010)



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