

State Trustees Client Service Charter



State Trustees is a Victorian Government-backed company providing financial and legal services at important life moments. For over 85 years, we have given Victorians from all walks of life confidence that their financial and legal affairs are in good order.

This Client Service Charter is our promise to you. It outlines our commitment to providing the standard of service you expect.



Our Promise to you:

♥ We work with you to make choices that support what's best for you

- We are committed to putting your interests first and acting with impartiality, fairness and respect.
- We manage your affairs responsibly and in line with relevant legislation and regulations.
- We prioritise keeping your information and assets secure.
- We work with you to make meaningful differences in your life, offering tailored solutions to meet your evolving needs.

♥ We act with honesty, fairness and care

- We act with honesty, transparency and integrity in all our dealings.
- We are respectful and professional at all times.
- We handle your personal and financial information with care and diligence.

♥ We communicate clearly and respectfully

- We actively listen to understand your needs.
- We enable you to communicate with us in the way you require – by telephone, online, in writing or in person (by appointment).
- We communicate with you in plain language, free from unnecessary technical language.
- We respond to you in a timely and respectful manner, providing clear timeframes for when you can expect to hear from us.
- We provide clear explanations about our services, fees and processes.

♥ We provide accessible and inclusive services

- We provide services that are accessible and inclusive regardless of your background, language, race, religion, age, gender, ethnicity or abilities.
- We will make reasonable adjustments to support individuals with specific requirements.
- We work with local, regional, rural and remote partners to ensure our services are accessible to all Victorians.

♥ We take responsibility for our work and always try to do better

- We are transparent about our decisions and provide clear explanations as part of our communication.
- We acknowledge if we make mistakes and take reasonable steps to address or correct them wherever possible.
- We invite feedback to improve the quality of our services.
- We embrace innovation to continually improve and deliver better outcomes for our clients.
- We regularly review our processes and policies to ensure they reflect community expectations and best practices.

What we ask of you

To help us deliver the best service we can, we ask that you:

- Be honest, collaborative, and respectful in all your dealings with us.
- Let us know if your circumstances change.
- Provide accurate and timely information.
- Tell us if you need more help to understand anything related to the service you receive from us.
- Raise concerns early so we can work together to resolve them.



Your Privacy

We know it is important that you can trust us with your personal information. We are committed to looking after it carefully and only use it properly.

You can read our privacy policy at statetrustees.com.au/privacy

Complaints and Feedback

We welcome your feedback because it helps us improve our services. You can share feedback privately, and you will be treated fairly.

You can give us feedback by completing our online form at statetrustees.com.au/feedback, emailing us at clientfeedback@statetrustees.com.au or by calling us on 1300 138 672.

Our Commitment

We understand the responsibility and trust placed in State Trustees when managing your financial and legal affairs. We are committed to delivering fair, transparent and professional services that protect your interests and provide you with confidence that your financial and legal affairs are in good order.



Contact us

Talk to us about how we can help you feel confident that your financial and legal affairs are in good order.

www



You can make an appointment or find more information on our website: statetrustees.com.au

Call us



Telephone

1300 138 672
8.30am - 5.00pm
Monday - Friday

Write to us



Mailing address

GPO BOX 1461,
Melbourne,
Victoria, 3001

Visit us (By appointment)



If you would like to visit us in our Melbourne or Bendigo offices, please make an appointment first so that we can have a consultant available to help you.

Connect with us



@statetrusteesvictoria



@company/state-trustees



@statetrusteesvictoria