

When we're appointed to look after your money.



Financial Administration



There are times when people need help with their financial and legal affairs. For example, someone who has a disability, illness or injury may need some support to manage their finances and make sure they are getting all the payments they are eligible for.

The Victorian Civil and Administrative Tribunal (VCAT) can appoint us to help. Once VCAT has appointed us, our financial consultants provide ongoing support that matches the needs of each person.

We have been helping people with Personal Financial Administration for decades. We currently help over 9,000 Victorians with their everyday financial and legal matters.

How we support you

Budgeting assistance

We work with you to create a budget and plan for each bill to make sure you have enough money to pay them.

Paying rent and bills

We pay regular accounts and bills from the money you have on time.

Managing property

We can support you living in your own home, or relocate. If needed, we can help you rent or sell your property.

Maximising your income

We identify and gather any income you're owed, while also checking for other income or benefits you may qualify for.

Working with agencies

We work with Centrelink, Department of Veteran Affairs, National Disability Insurance Scheme (NDIS) and international pension agencies to help you get any additional benefits you're entitled to.

Superannuation claims

We assist with early superannuation claims, including insurance-related claims.

www



You can find out more at
statetrustees.com.au/financialadministration

Managing debts

We manage your existing debts and negotiate with creditors to explore repayment options to help reduce your stress of dealing with collection agencies.

Legal matters

We can investigate and manage any current or future legal issues you may have. We provide assistance with Transport Accident Commission (TAC) claims, WorkCover claims or other legal entitlements.

Financial independence

Where suitable, we work closely with you to help you manage your financial and legal affairs.

Aged care transition

We assist with financial assessments, bond negotiations and property preparations.

Aged care residence

We manage nursing home fees, pharmacy accounts and other expenses.

Safe-guard your finances

We protect your money from those who may try to take advantage of their relationship with you to access it.

How to access this service

The Victorian Civil and Administrative Tribunal (VCAT) can appoint us to manage your financial and legal affairs or the affairs of someone you know, when decision making capacity is lost. The process for this is:

Apply to VCAT

Submit an application with supporting documents.

Assessment hearing

VCAT will review your application and may schedule a hearing.

VCAT appointment

An administrator such as State Trustees may be appointed.





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



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