

# Getting ready for when we visit you

**This information will help you get ready for the questions we will ask you and the documents we will need from you.**

## Getting to know you

When we visit you, we will talk about your situation and what you need so we can give you the right support. This information will also help us make your budget together. A budget is a plan to help you save and spend your money.

### We will discuss topics like:

#### 1. Your current financial situation

This includes the money you earn, payments you receive, savings you have, or any money you owe to others.

#### 2. What is important to you

We want to make sure your budget includes what is important in your life. This includes your pet, your car, or saving money for your child.

#### 3. What you enjoy doing

Understanding your interests will help us budget for them. For example, you might enjoy going to the movies.

#### 4. What you are saving for

We can help you plan your budget so you can reach your savings goals, whether it's for a holiday or something for your home.



During our visit, it's a good time to ask any questions you may have about us and our services.

## What to get ready

We might ask you for copies of these documents so we have all the information we need to help you. If you can, please have copies ready for when we visit you.

- ✓ Proof of who you are – like your birth certificate, drivers' licence, passport or proof of age card
- ✓ Your Medicare card number
- ✓ Your most recent tax return or notice of assessment
- ✓ Bank statements – including any savings or investment accounts
- ✓ Automatic payments that come out of your bank account
- ✓ Regular bills you pay, like power and phone bills
- ✓ Information about any money other people or companies owe you
- ✓ Any money you owe other people or companies
- ✓ Insurance details – like your car, home, contents or health insurance
- ✓ Your car registration – if you have a car
- ✓ A copy of your rental or lease agreement for where you live
- ✓ An 'income and assets notice of assessment' if you live in aged care
- ✓ Details about any Australian or foreign pensions or superannuation you receive.



It's ok if you do not have all this information ready when we visit. We will help you through it.



### We use this information to:

1. Pay your bills on your behalf that are due or overdue.
2. Know where your money is located, like your bank accounts.
3. Know where your income is coming from.
4. Make sure you have enough money for your daily needs, like food.
5. Protect your belongings, such as your house or car.
6. Make sure you get all the benefits you are entitled to.



**Tip:** Someone you trust, such as a family member or support worker, can help you gather this information. We will also try to contact the people who are close to you before we visit you to see if they can help us with any of this information.



## Contact us

### Your journey starts here

All the information you need to know, including how you will be supported through your journey with State Trustees, is available at **[www.statetrustees.com.au/welcome](http://www.statetrustees.com.au/welcome)**. You will also find information in languages other than English.



#### Talk to us

For anything urgent, please call us first on **1300 138 672** Monday to Friday 8.30am–5pm.



#### Email us

For less urgent enquiries email us at **[FAsupport@statetrustees.com.au](mailto:FAsupport@statetrustees.com.au)**. Please include your full name and client number in the subject line.



#### Visit us by appointment

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



Remember to use your client number whenever you contact us.