

Looking out for
your best interests



Looking out for your financial and legal interests.

Everyone deserves to have their interests protected, regardless of their background or personal circumstances.

At times, individuals in our community need help with their everyday financial and legal affairs; this is where State Trustees can help. We provide personal and ongoing support tailored to the needs of individuals, who due to disability, illness or injury are unable to manage their own financial and legal affairs. State Trustees has been providing financial administration for more than 70 years. In fact, we currently help more than 9,000 Victorians with their everyday financial and legal matters.

Trusted to protect your interests

State Trustees may be appointed by the Victorian Civil and Administrative Tribunal (VCAT) to administer and protect your financial affairs. When VCAT appoints us, our role is to help you make the most of your income and protect your financial and legal interests. So you can have peace of mind that your ongoing and long term welfare is protected.

With the right support you can enjoy life

“As much as I wanted to help my brother Richard, with two children of my own and a demanding career, I knew I wouldn’t have the time to look after him the way he really needed.”

Josephine had tried for many years to help her brother Richard manage his day to day financial affairs, but with Richard’s illness this was no easy task.

Just when things seemed to be going well, Richard would spend all his entitlements on the day he received them, leaving him without any money and dependent on his sister for financial support.

While it was becoming more and more evident that Josephine needed some help for her brother, the process of getting an administration order seemed daunting and complicated. Eventually Josephine phoned State Trustees’ Advice Line and immediately the weight was lifted from her shoulders.

State Trustees provided immediate advice to Josephine and worked with her to make an application to VCAT. At the VCAT tribunal hearing, Josephine requested State Trustees be appointed administrator to manage Richards’s financial and legal affairs.

State Trustees helps Richard stay on track by managing his finances and connecting him with the right support in the community. With ongoing help, he is able to enjoy a good quality of life, easing the burden on Josephine and providing her peace of mind that Richard’s finances are managed in his best interests.



When we have been appointed by VCAT to act as your Administrator, our responsibility is to help provide you with financial security, help protect your legal interests, and collect all benefits entitled to you. While we will make every effort possible to accommodate your requests, we will always act responsibly to protect your best interests over the long term.

What we can do for you

We will help you manage your financial and legal affairs

Our dedicated team of consultants will:

- ensure your pension entitlements are collected
- identify and collect any income you are entitled to, or income from other sources
- contact anyone who owes you money and attempt for the debt to be recovered
- manage your every-day banking needs and arrange funds for your personal expenses
- manage your assets and investments
- maintain accurate records of your finances
- contact your creditors and arrange repayment of any outstanding debts you might have
- arrange payment of your bills and everyday living expenses with various companies
- ensure your property is insured and all relevant expenses, such as rates, are paid if you own your own home
- investigate and attempt to resolve any unsettled legal issues.

How we help you

Where do I start?

Once State Trustees has been appointed by VCAT as your administrator, one of the first things we do is introduce you to our consultant team.

Our consultants are experienced in legal and financial matters and will make decisions with professionalism and understanding, so your financial and legal interests are protected.

What can I expect State Trustees to do?

We will meet with you and help you organise and plan your finances, as well as prepare your budget and identify your specific financial needs. We will help address any concerns you might have and provide solutions to any sensitive or complex financial or legal issues.

We will also discuss your long-term financial needs and find ways you can take steps towards achieving your long-term goals.

What ongoing support do you provide?

When managing your every-day finances we work hard to help ensure your best interests are supported. We will consider all the requests you make carefully.

If at any time, you would like a summary of your financial transactions for the current financial year to date, you can ask for a copy of your Statement of Financial Account and we will arrange this for you.

How long will State Trustees be helping me for?

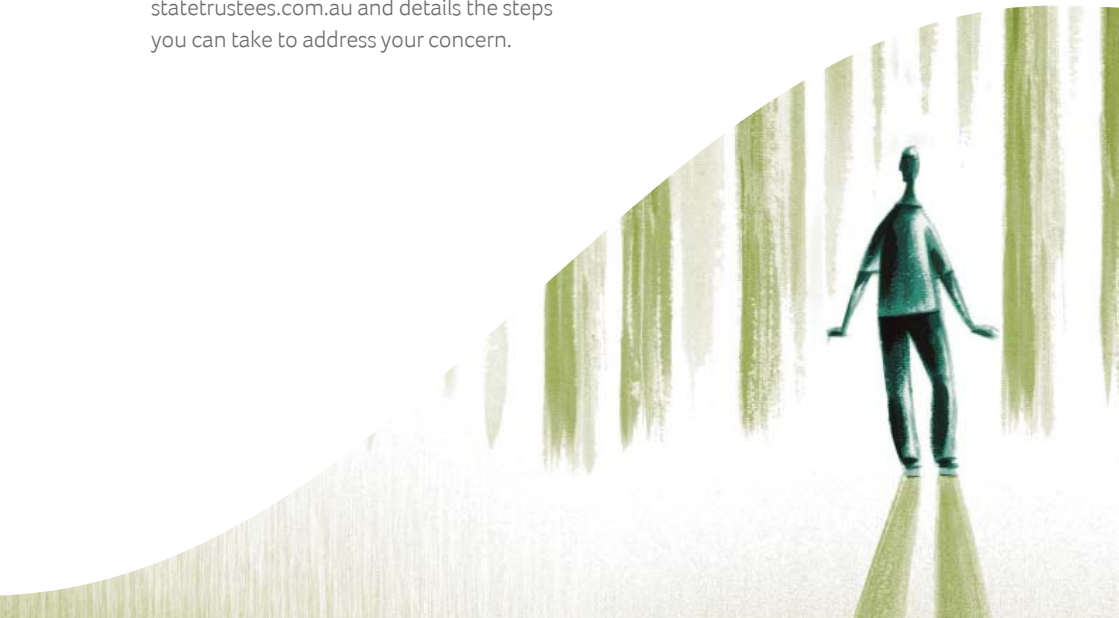
In most cases, VCAT reviews your situation every three years. At the review, VCAT will check to see that your needs are being met and will decide if you still need our help.

What do you charge for your service?

State Trustees charges fees for administering your affairs. You can find the details of our fees in the Guide to Services, Fees & Charges booklet online at statetrustees.com.au.

Where can I turn if I have a concern?

State Trustees is committed to providing the highest level of service to achieve the best outcome for you. However, from time to time we understand you might have a concern you would like to discuss with someone independent. The brochure Resolving Concerns, is available online at statetrustees.com.au and details the steps you can take to address your concern.



Find out more about how State Trustees can help you

Your wellbeing is important. At State Trustees, we believe all Victorians are entitled to have their financial and legal interests protected. When we are appointed by VCAT to help administer your affairs, we will work hard to help ensure your best interests are supported.



**Find out more about how
State Trustees can help you.**

**Visit us online at statetrustees.com.au,
in person at our offices across Victoria,
or over the phone 03 9667 1110.**