

## Trust and Asset Management

### Court Trusts

A court trust is established when a court, tribunal or assessor awards damages to a person who is injured, and that person is unable to manage the funds themselves. The Public Trustee can act as trustee to make sure the money is used in accordance with the law. Our Trust Managers will professionally manage the financial affairs of the injured person to ensure that the funds are used to provide them with the best possible care and quality of life.

### Represented Persons



If a person has lost their decision-making capacity (e.g. due to mental illness or dementia), the State Administrative Tribunal (SAT) can appoint the Public Trustee to manage their financial affairs. SAT makes decisions on whether the Public Trustee's authority will be all-encompassing

(plenary) or limited to specific matters.

### Supporting Private Administrators

Where a private administrator has been appointed to manage the financial affairs of a represented person, the Public Trustee's Private Administrator Support (or PAS) team provides guidance and support to private administrators. The PAS team also examines the annual accounts prepared by private administrators.

## Give2Good

Give2Good is a Western Australian community foundation that aims to attract, grow and distribute charitable funds.

The Public Trustee invests these funds to create a stream of ongoing funding for charitable

organisations. Donations and bequests made to Give2Good accumulate to form funds intended to be invested indefinitely, with earnings being returned to the community in the form of annual grants. For more information, visit [www.give2good.com.au](http://www.give2good.com.au).



### For further information or to make an appointment:

**Telephone:** 1300 746 116 (Wills, Enduring Powers of Attorney, Deceased Estate Administration)

1300 746 212 (Trusts and Represented Persons)

**Visit:** 553 Hay Street Perth

**Hours:** 8:30am – 4:30pm Monday – Friday  
(closed Public Holidays)

**Email:** [Public.Trustee@justice.wa.gov.au](mailto:Public.Trustee@justice.wa.gov.au)

**Fax:** (08) 9222 6617

**Web:** [www.publictrustee.wa.gov.au](http://www.publictrustee.wa.gov.au)



## Public Trustee



- Wills • Deceased Estate Administration
  - WA Will Bank • Give2Good
  - Trust Management
- Private Administrator Support



Government of Western Australia  
Department of Justice

## The Public Trustee

The Public Trustee is a Statutory Authority established to provide legal, financial and asset management services for Western Australians. Accountable to both the Attorney General and Auditor General, clients can confidently entrust the Public Trustee to manage their estate and/or financial affairs.

Our professional staff includes highly experienced wills lawyers, estate and trust managers, lawyers, accountants, taxation specialists and investment managers who can help you or your loved ones with:

- Writing and updating Wills
- Safely storing Wills in the WA Will Bank
- Writing Enduring Powers of Attorney
- Administering deceased estates when acting as executor or administrator
- Acting as trustee for damages awarded by a court, tribunal or assessor after an accident or injury
- Acting as trustee for a minor or charitable trust
- Managing the financial affairs of a person who is unable to manage their own
- Providing support for, and examining the accounts of, a private administrator
- Investing client funds and providing legal advice or representation when required



## Drafting & Storing Wills

### Wills

The Public Trustee is the leading provider of quality Wills in WA and has the expertise to advise on many legal, financial and practical implications of decisions relating to distributing an estate.

Making a Will can help provide financial security for your loved ones and to make known your wishes about who you would like to benefit from your estate.

### Drafting Wills nominating the Public Trustee as executor

The Public Trustee drafts Wills that nominate the Public Trustee as executor or substitute executor. We can also act as trustee for any trusts established in the Will, for example trusts for minors (a person under 18) or a charitable trust.

### Drafting Wills nominating private executors

The Public Trustee can also draft Wills at very competitive rates for people who nominate a private executor, such as a family member or friend.

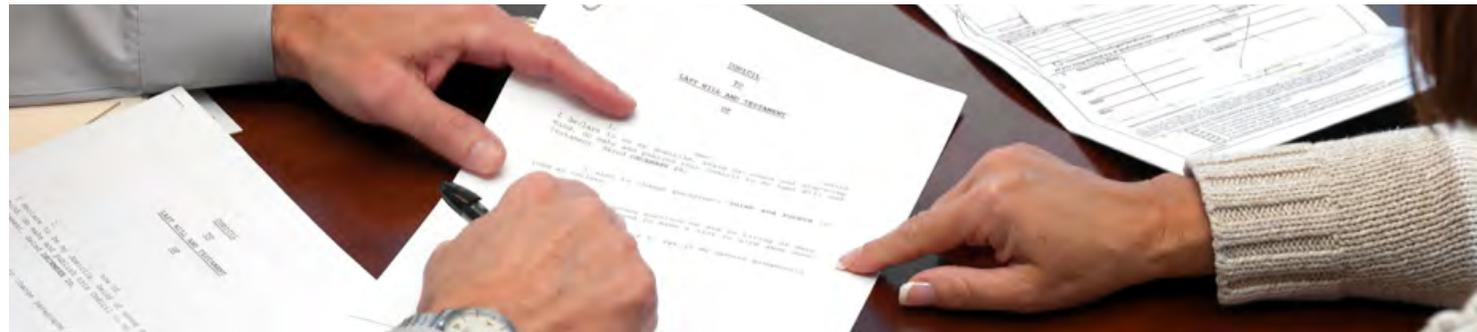
### WA Will Bank

The WA Will Bank is a free service for testators that securely stores the Wills of over a hundred thousand Western Australians. Our purpose-built, fireproof vault keeps Wills safe from loss, theft or damage to ensure beneficiaries are able to find the original Will after their loved one passes away. There is no charge for people who lodge their own Will.



### Enduring Powers of Attorney

The Public Trustee drafts Enduring Powers of Attorney that appoint the Public Trustee or your spouse (or de facto partner) as your attorney.



## Deceased Estates

### Deceased Estate Administration

The Public Trustee provides a full deceased estate administration service. When nominated as the executor in a Will, or appointed as administrator, the Public Trustee will, where appropriate:

- Locate and notify beneficiaries
- Value and look after the estate
- Prove the Will in Court
- Pay debts and establish any trusts
- Complete income tax returns
- Divide the estate among beneficiaries