

Your Guide to Financial Administration

Easy Read Guide



www.publictrustee.tas.gov.au

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How to use this guide



The Public Trustee wrote this guide.

When you see the word 'we', it means the Public Trustee.



We wrote this guide in an easy-to-read way.
We use pictures to explain some ideas.



We wrote some hard words in **bold**.

This means the letters are thicker and darker.
We explain what the hard words mean.



You can ask for help to read this guide.

You could ask a friend, family member,
support person or advocate.

Welcome to the Public Trustee



Sometimes people need extra support with their money matters.

This could be because of:

- disability or
- illness.



We will be supporting you with your money and **belongings**.



Belongings are things like your bank accounts, furniture, car, and house.

We call these things your money matters.



We wrote this guide because we want to make sure you know:

- what is happening
- what we do
- how we can support you
- what your rights are when working with us.

Who will support me?



You will have a **Client Account Manager** at the Public Trustee.

We call them **CAM** for short.



Their job is to support you with your money matters

If you need help or have any questions, ask your CAM.

Your CAM will talk to you often.



They can do this however you want:

- Face to face
- Phone – 1800 068 784
- Email
- Text

Why am I with the Public Trustee?



The **Tasmanian Civil and Administrative Tribunal** has asked us to support you look after your money matters.

We call them **TASCAT** for short.



They decided you need more support to look after your money matters.



TASCAT made an **Administration Order**.

We call it an **Admin Order** for short.

An **Admin Order** is a legal decision.



This means the law says we must look after your money matters.

When will this start?



The Admin Order starts as soon as TASCAT makes the decision.



It can take us up to 6 weeks to get things set up.



Your CAM will contact you during this time.

Talk to them if you are worried or if you do not understand things.

How long does an Admin Order last?



An **Admin Order** can last for 3 years.

TASCAT then checks to see if you can look after your money matters yourself.



They may decide you can take care of your money matters.



They may decide you still need support.

What happens now?



Your **CAM** will meet with you and:



- explain how we will support you

- ask you questions about your money matters



- ask how you like to use your money

- help with any urgent money matters



- explain our fees and charges.

How will the Public Trustee support you?

We support you to:



- Look after your money matters to get things on track



- Keep your banks accounts and things you own safe.



- Make a **budget** to buy the things you need and want.



A **budget** is a plan to:

- pay your bills
- decide what you can spend your money on
- save up for things you would like.



- Get payments from Centrelink and other places.



- Contact other services that could help you like:
 - housing, legal, NDIS or disability service



- If you own your own home, we can support you to:
 - pay your household costs using your own money
 - arrange for repairs and maintenance.



- If you own your own home and must sell it, we can help.



- We will give you a **statement** at least once a year.
- We can give this to you more often if you ask.

A **statement** is like a report about your money matters.

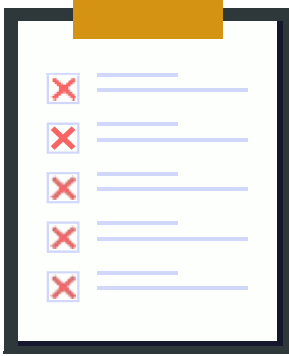
It tells:

- how much money you have
- what you owe to others
- the things you own, like a car or a house
- what fees you have paid to us



- You should only share this statement with people you trust.

Important things you need to know



While the Public Trustee is helping to look after your money matters, there are things you cannot do.

You cannot:



Borrow money from anywhere.

- This includes Centrelink or the bank.



Sign a legal contract, such as:

- a rental lease or
- phone contract.



Sell things at secondhand dealers



Sell things you own, like a car or house.



Make a gift unless your Admin Order says you can.



If you are not sure, ask your CAM.

What if your information changes?



Your name

Address

Phone

Tell us if any of your information changes, like:

- name
- address
- phone number, or
- you get a new bill or
- are asked to pay for something



How do we keep your private information confidential?



It is very important that we keep the personal information confidential.

We always follow the law to protect your privacy.

Your Rights and the Public Trustee



Your rights are important to us.

The law says we must look after your money matters well.



We will:

- Respect your rights and dignity
- Promote your personal and social wellbeing



- Support you in making decisions that affect you as much as possible



- Talk to you about any decisions



- Communicate with you in a way that you understand



- Take your cultural and language needs into account



- Support you to build the skills to manage your own money matters



- Recognise the role of your close family members, friends, and supporters



- Respect your right to an advocate if you want one.

How does your CAM support you make decisions?



We listen to you about what is important to you about your money matters.

We follow your wishes as much as we can.



When you want to buy or sell something or need more money, we will:

- Talk with you so we understand why this is important to you.



- Give you the information you need, such as if you have enough money.
- Help you think through everything.



- Sometimes you might need to save up for big things.

What if you want more control over your money?



Talk to your CAM.

They can help you build the skills to look after some or all your money matters.



They do this by helping you to make a budget.



They will support you to make decisions about your money.

What are the fees and charges?



Fees can be different for everyone.



Your CAM can tell you about the fees for your situation.



Your statement will also tell you what you have paid us.

Can you get the Admin Order changed or removed?



You can ask TASCAT to have your Order changed.

Or you can ask that the Public Trustee be removed as your Administrator.



Your CAM can give you more information or you can contact an advocate or lawyer.

The details are on pages 24 and 25.

What if you have concerns or a complaint?



We are always working to improve our services.

We want to know if you are not happy.



It is okay to talk to us about your concern or complaint.

A family member, friend, or supporter can help you.



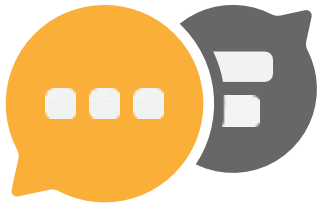
Advocacy Tasmania, or



Speak Out Advocacy can also help you.



If your CAM can not help with your concern, talk to the Personal Services Manager on 1800 068 784.



To give feedback or make a complaint to the Public Trustee, contact us:



Phone: 1800 068 784.



Email: feedback@publictrustee.tas.gov.au



Postal address:

Public Trustee

GPO Box 1565, Hobart TAS, 7001

Other people who can help you.



You may want to have someone who is not a family member, friend, or supporter to help you.



An **independent advocate** can give you information about your rights.

- They can help you speak up and have your say.
- They can support you at meetings with the Public Trustee and at TASCAT hearings.

You can get an independent advocate from:

**Advocacy
Tasmania**
in your corner

- **Advocacy Tasmania**

Call 1800 005 131 or
www.advocacytasmania.org.au

SPEAKOUT
ADVOCACY

- **Speak Out Advocacy**

Call 6431 9333 or
www.speakoutadvocacy.org



If you want legal advice about your
Admin Order or;

help at your TASCAT hearing

You can contact:



- **Tasmania Legal Aid**

Call 1300 366 611 or

www.legalaid.tas.gov.au



If you can pay for a private lawyer,
ask your CAM for information.

Some things to bring to your first meeting



- ☐ Identification, such as your birth certificate, passport or drivers' license.
- ☐ Medicare card.
- ☐ Centrelink number and information about your payments or pensions.
- ☐ Department of Veterans Affairs (DVA) number and information about your payment.
- ☐ Latest bank statement.
- ☐ Information about the regular bills you pay
- ☐ Information about direct debits you have from your bank accounts or Centrepay.
- ☐ NDIS plan (if you have one).



Other useful information if you have it:

- ☐ Rental contract or tenancy agreement.
- ☐ Car registration.
- ☐ Insurance details - car, house and contents.
- ☐ Private Health Insurance details.
- ☐ Superannuation details.
- ☐ A copy of your Will.



To work out your budget, it is also helpful to know if:

- ☐ You have any debts.
- ☐ You are owed any money.
- ☐ You have any shares or other investments.
- ☐ Someone is leaving you money or things in their Will.

CALL US ON

1800 068 784

VISIT US AT

www.publictrustee.tas.gov.au

Email: tpt@publictrustee.tas.gov.au

Fax: (03) 6235 5255

GPO Box 1565 Hobart TAS 7001

Our nearest Public Trustee location

Hobart
Launceston
Devonport

www.publictrustee.tas.gov.au