

# About the Public Trustee of Queensland

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The Public Trustee has been serving Queenslanders since 1916 and is governed by the *Public Trustee Act 1978*. The Public Trustee is self-funding and receives no financial assistance from the Queensland Government. Operating as a corporation sole, we provide financial, trustee and legal services to the people of Queensland.

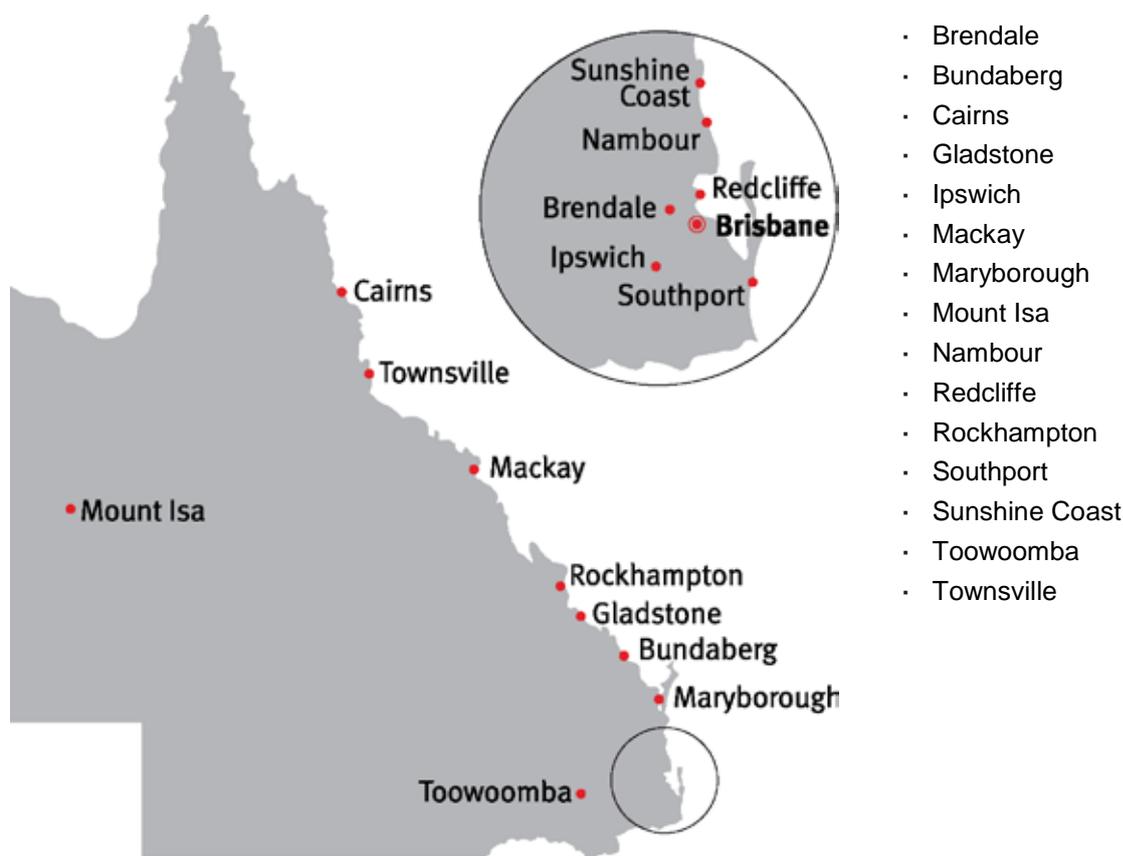
In providing our services we aim to ensure:

- prudent management of the financial assets of members of the community
- an orderly succession of property between generations with minimum recourse to the court system, and
- assistance to the Queensland community by making Wills free of charge and Enduring Powers of Attorney documents at an affordable cost.

## Our locations

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We provide our services through a head office at 444 Queen Street, Brisbane, and a network of 15 regional offices in the following locations:



We also provide services outside of the above locations which are supported by the Queensland Government Agent Program (QGAP) and the local court networks.

For contact details of our office locations and where our services are provided outside of our regional office locations, please refer to page 43. Alternatively, you can also visit our website at [www.pt.qld.gov.au](http://www.pt.qld.gov.au)

## Our vision

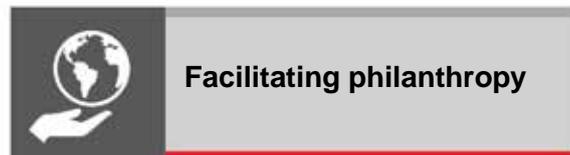
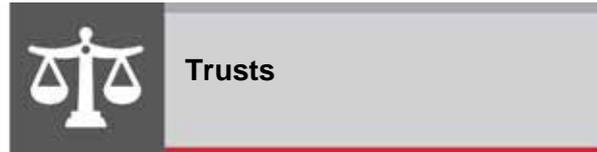
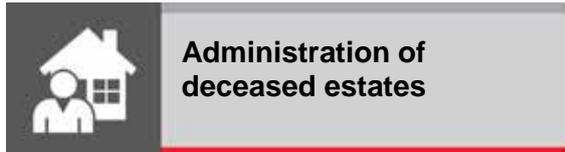
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**To be Queensland's best provider of trustee and administration services.**

## Our purpose

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To provide professional and accessible services in:



In addition to our core services, we also provide the following services:

- unclaimed moneys administration for the State of Queensland
- managing the financial affairs of prisoners pursuant to Part 7 of the *Public Trustee Act 1978*
- special functions of a public nature. A complete list of the applicable legislation is on page 38.

## Our values

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In 2014 we adopted the values of the Queensland Public Sector. The goal of the public sector is to be a high performing, impartial and productive workforce that puts clients and the people of Queensland first.

Pages 30–31 of this report highlight how the Public Trustee is implementing and embedding these organisational values into all areas of our operations.

- Clients first
- Ideas into action
- Unleash potential
- Be courageous
- Empower people

## Our achievements

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Our key achievements during 2014–15 included:

- provision of a range of CSOs at \$30.4 M at no cost to Government including:
  - fees rebated for some clients with limited assets
  - provision of free Will making service
  - public education in areas such as Wills and Enduring Powers of Attorney documents with an emphasis on planning for life
  - supporting a range of community services such as the Office of the Public Guardian and funding of the Civil Law Legal Aid Scheme administered by Legal Aid Queensland
- continued enhancements to frontline service delivery through the:
  - implementation of structured level one technical training for trust officers as part of a comprehensive training framework. This training is delivered over a six month period
  - development of structured level two technical training for trust officers
  - development of a structured level three technical training for trust officers for implementation in 2015–16

The delivery of the training is the culmination of a three year project to increase the technical skills of trust officers leading to improved client service
- a third annual client satisfaction survey to measure and identify areas for improvement in the provision of services for:
  - deceased estate administration
  - financial management for clients with impaired capacity
- review of the governance arrangements of large charitable trusts to meet changes in the regulatory regime
- planning for the end to end review of deceased estate administration to identify opportunities to improve service delivery
- planning for the creation of a testamentary trust Client Service Centre (CSC) to improve service to clients
- ongoing review of service delivery models and locations to better meet growing and changing demographic needs of Queenslanders
- activating business continuity planning in preparation for severe tropical cyclones Marcia and Nathan to ensure the delivery of services to clients was maintained
- the provision of funding and data to assist in the preparation of the Australian Research Council report on Will making and contestation in Australia
- providing ongoing sponsorship to the Department of Communities Elder Abuse *'Trust your instinct'* campaign
- implementation of improvements to the practices of the Office of the Official Solicitor to increase efficiencies and improve service to clients
- participation in inter-jurisdictional conferences and maintaining key relationships with other Australian Public Trustees
- appointment of a preferred provider for superannuation services for clients
- extension of the revised client investment strategy to more client categories
- partnering with our financial planning service provider to build capability to assess aged care accommodation options
- improved our Information Technology (IT) service delivery capability relating to service operations
- enhanced our IT security and technology health of core information systems

## **Our strategic direction**

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Our strategic direction is documented in the Public Trustee of Queensland Strategic Plan 2012–16 (strategic plan) which was updated and approved in June 2015 by the Acting Public Trustee of Queensland and is available on our website. The strategic plan was effective from 1 July 2015 and sets the parameters for our future direction to staff, clients and other stakeholders.

Our strategic plan demonstrates how we will contribute to the achievement of the whole of government objectives for the community, priorities and strategies. It also includes performance indicators determining how our objectives will be measured.

The Queensland Government's objectives for the community are:

1. Creating jobs and a diverse economy
2. Delivering quality frontline services
3. Protecting the environment
4. Building safe, caring and connected communities

The Public Trustee contributes to the Queensland Government's objectives in the following way:

### **Our clients**

#### **Meet the needs of clients in an ethical, professional and responsive way**

- continue to maintain our focus on frontline service delivery for our core purpose
- integrate demographic analysis into future service delivery planning and implementation
- provide professional and accessible services
- plan business model to meet growing demand for frontline services
- establish more effective and efficient delivery of services to meet increasing stakeholder demand

### **Our services**

#### **Develop innovative services in a client responsive manner**

- continue to meet the growing demand for the delivery of services that assist the community
- drive efficiencies to reduce the costs associated with special purpose functions and unclaimed money
- ensure that investment strategies are prudent, competitive and ethical

### **Our business**

#### **Maintain a viable business model and develop our internal operations to fund a broad range of services at no cost to government**

- review the future capacity of the organisation's resources to assist Queenslanders
- develop opportunities to grow our business in areas that complement our core services
- manage the business model through an efficient use of resources
- investigate opportunities within existing business practices to support the continued viability of the organisation
- raise the public image and profile of the organisation through sustained community engagement
- promote openness and transparency in our decision-making

## Our people

### Develop and maintain an engaged workforce

- attract and retain key personnel in a competitive labour market
- enhance the skill of our people to promote higher levels of customer service and productivity
- create opportunities for professional development within the organisation
- develop knowledge pathways to support future advancement of staff within the organisation
- promote a healthy workforce and maintain a safe work environment

These strategies are necessary to maintain our frontline service delivery commitment to the people of Queensland and support our initiatives that contribute to the Queensland Government's objectives for the community.

## Our future priorities

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To support our strategies, a number of key priorities for 2015–16 have been identified including:

- providing ongoing financial management for Queenslanders with impaired financial decision making capacity
- continued provision of a range of CSO's at no cost to Government
- investment in the enhancement of technology and continual review of service delivery models and locations to better meet growing and changing demographic needs of Queenslanders
- investment in upgrading facilities at regional offices to better service clients
- enhancement of frontline service delivery in response to client satisfaction survey outcomes
- completing the end to end review of deceased estate management
- undertaking an end to end review of financial management activities to identify opportunities for improvement
- providing services to the philanthropic sector.

## Our key challenges

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In 2015–16, we will continue to deliver effective and efficient frontline service delivery by ensuring our business model is capable of meeting the increasing demand for our core services. The expected increase in demand for services is a result of the effect of the 'Baby Boomer' generation reaching retirement age. This generation controls much larger and more complex asset structures than any previous generation and are expected to live longer than previous generations. These factors will continue to drive an increase in clients requiring assistance in managing their financial affairs and the administration of deceased estates.

The key challenges to achieving our core commitments are:

- improving efficiency and effectiveness of frontline service delivery to meet increasing client expectations
- increasing demand for services that attract a CSO
- growing reliance on our services to meet demand resulting from the changing socio-economic demographics
- refining our business model to meet increasing complexity associated with client needs
- maintaining community confidence in the quality and value of the services we provide.

# Our 2015–16 budget highlights

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We are committed to meeting the Government objectives to provide quality and efficient services to our clients. We continue to redevelop regional offices to improve efficiency of frontline service delivery and accessibility to all clients, as well as continuing to maintain appropriate workplace health and safety standards for clients and staff.

During 2015–16 capital expenditure is estimated to be **\$13.5 M** which includes:

