

Financial Independence Pathway



The Public Trustee offers the Steps to **Financial Independence Pathway** to our financial management customers wanting greater control of their money.

It is important our customers understand that the Queensland Civil and Administrative Tribunal (QCAT) makes financial independence decisions for customers wanting to control all of their money, not the Public Trustee. We are, however, here to support customers every step of the way.

The Steps to Financial Independence Pathway (pathway) generally takes twelve months and we will help to gather the evidence required to complete a 'Declaration of Capacity' – if the customer is seeking control of all of their money.

The 'Declaration of Capacity' requires a medical report. The report may be from a treating GP or other health professional.

Customers can still be a part of the pathway and do not need to apply for a 'Declaration of Capacity' if they are just wanting more control of some of their money.

The pathway is tailored to the goals and needs of each customer and there are regular reviews and evaluation of progress along the way. A referral to a financial literacy and resilience service provider is also an option for customers to help increase their financial literacy.

Customers wanting more information about the pathway should contact their Trust Officer directly. Our Trust Officers are here to help support their customers to reach their goals.



Public Trustee

visit our website
www.pt.qld.gov.au