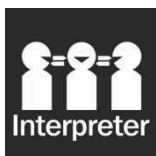


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The Public Trustee is committed to providing accessible services to Queenslanders from all culturally and linguistically diverse backgrounds. If you have difficulty in understanding this annual report, you can contact us on 1300 360 044 and we will arrange an interpreter to effectively communicate the report to you.

An electronic copy of The Public Trustee of Queensland Annual Report 2021–22 is available online at www.pt.qld.gov.au. You can also contact us to request a copy by calling 1300 360 044 or emailing governance@pt.qld.gov.au

A number of annual reporting requirements are also addressed through publication of information on the Queensland Open Data website at <https://www.data.qld.gov.au/>.

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Content from this annual report should be attributed as: The Public Trustee of Queensland annual report 2021–22.

Our acknowledgment

We acknowledge the Australian Aboriginal peoples and Torres Strait Islander peoples of this nation, the traditional custodians of these lands. We pay our respects to their ancestors, our First Nations peoples, their spirits, and their legacy which give strength, inspiration and courage to current and future generations, both Indigenous and non-Indigenous, towards creating a better Queensland.

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Letter of Compliance

410 Ann Street Brisbane Qld 4000
GPO Box 1449 Brisbane Qld 4001



31 August 2022

The Honourable Shannon Fentiman MP
Attorney-General and Minister for Justice,
Minister for Women and Minister for the Prevention of
Domestic and Family Violence
GPO Box 149
Brisbane QLD 4001

Dear Attorney-General

I am pleased to submit for presentation to the Parliament the Annual Report 2021-2022 and financial statements for the Public Trustee.

I certify that this Annual Report complies with:

- the prescribed requirements of the *Financial Accountability Act 2009* and the *Financial and Performance Management Standard 2019*, and
- the detailed requirements set out in the *Annual report requirements for Queensland Government agencies*.

A checklist outlining the annual reporting requirements is provided at page 113 of this annual report.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Samay Zhouand', written in a cursive style.

Samay Zhouand
Public Trustee of Queensland and CEO

The Public Trustee

• Will-making
• Enduring powers of attorney

1300 360 044

• Executor services
• Estate administration

www.pt.qld.gov.au

• Disability services
• Trust administration

ABN 12 676 939 467

• Real estate auctions and sales
• Charitable trusts

CEO's Report

The past year has seen a period of significant change in the Public Trustee as we continued our journey to transform into a more modern, customer-focused organisation. This renewal extends to all parts of the Public Trustee, including the information and support we provide to our customers, how we support our staff in making decisions for our customers, our fees and charges and how we respond to customers when they raise concerns with us.

In addition, the ongoing impacts of the pandemic and severe weather events experienced across Queensland have driven the need for increased flexibility in how we support our staff and ensure we can continue to deliver services to our customers.

A range of key achievements were delivered by the Public Trustee in 2021-22.

The Public Trustee's Customer Advocate, established in 2021 and a national first for state trustees in Australia, has continued to advocate for fair and equitable outcomes for our customers. In the past year, the Customer Advocate was involved in 52 customer matters, facilitating communication between our customers and our staff, and helping achieve positive customer outcomes. These have included assisting customers who wished to return home from living in a care facility, obtaining emergency funding for living expenses and seeking expert advice on strategies to assist customers with specific challenges. The Customer Advocate also works with external advocate groups to drive better outcomes for the Public Trustee's customers.

The Report of our comprehensive Fees and Charges Review was also completed and implementation of the recommendations is a priority for the coming year. The Review, which commenced in 2020, is the most comprehensive review of the Public Trustee's fees and charges in more than two decades. The scope of the Review included consideration of the recommendations arising from the Public Advocate's Report. Targeted consultation occurred with key stakeholders and a senior government steering advisory committee assisted the review.

In 2020-21, we implemented the Structured Decision-Making Framework which is a tool to support our Trust Officers ensuring that the views, wishes and preferences of our customers are heard and considered, along with their human rights, as part of the decision-making process. I am pleased to report that an evaluation of the adoption of this industry-leading framework by the La Trobe University's Living with Disability Research Centre found that the Public Trustee had successfully implemented a new, more rights-based and customer-centric way of working.

We have also partnered with national law firm Sparke Helmore to support their First Nations Will Service and provide free storage of Wills at our purpose-built secure storage facility. In conjunction with the Institute for Urban Indigenous Health and Community Legal Centres Queensland, an ongoing monthly Wills Clinic will be established where clients will have a Will prepared, free of charge, by lawyers from Sparke Helmore.

The Public Trustee has also partnered with Elders-in-Council from the Minjerribah Moorgumpin Aboriginal Corporation to deliver community education to highlight the importance of advance life planning, particularly Wills and Enduring Powers of Attorney. This ongoing initiative provides an opportunity to address the historically low rates of our First Nations people who have a valid Will and Enduring Power of Attorney.

The launch of our Pearls of Wisdom community education video in May this year aimed to highlight the importance of advance life planning which includes having important documents in place such as a valid Will, Enduring Power of Attorney and Advance Health Directive. We partnered with the Logan Area Committee on the Ageing to gather stories from older Queenslanders who generously shared their knowledge and life learnings to encourage all Queenslanders of all ages, to have conversations with those they trust about their wishes for the future.

Our community engagement also included the delivery of regional community forums in Toowoomba, Caloundra and Cairns. At these events, experts came together at a local level to start conversations around preventing and supporting residents experiencing elder financial abuse. This is an issue where the Public Trustee plays an important role – we help to protect, support and care for vulnerable Queenslanders, especially when it comes to financial abuse.

The positive outcomes of these initiatives and many other achievements in the past year are testament to the commitment and resilience of all of our dedicated staff.



Samay Zhouand
Public Trustee of Queensland and Chief Executive Officer (CEO)