

# MINOR TRUST – FUND REQUEST FOR FAMILY MAINTENANCE

**This form is to apply for Trust funds to be used for family maintenance purposes.** Before completing this form, it's important to know that when funds are used from the Trust, there will be less money available to be invested, which will reduce the investment returns and amount of money available for the child at the end of the Trust. Where possible it's recommended that alternative funding be sought prior to requesting funds from the Trust.

Please complete this form and return to:

Queensland Public Trustee

by post to PO Box 220, Margate Beach QLD 4019

by email to **minors@pt.qld.gov.au** and quote the reference number located in your letter.

## Section 1 – Trust details

Full name of Minor who holds the Trust	
Reference number ( <i>contained in letter</i> )	

Full name of Guardian	
Email	
Telephone	

## Section 2 – Family income and expenses

Provide your family income and expenses to assess eligibility for Trust maintenance funds.

FAMILY INCOME		
Description	Weekly income (before tax)	
Net income 1	\$	
Net income 2	\$	
Family allowance	\$	
Interest/dividends	\$	
Other income	\$	
<b>Total family income</b>	<b>\$</b>	
FAMILY EXPENSES		
Category	Description	Weekly
House expenses	Mortgage/s	\$
	Rent	\$
	Council rates	\$
	Insurance	\$
	House maintenance	\$

FAMILY EXPENSES <i>(continued)</i>		
Living expenses	Groceries	\$
	Clothing	\$
	Bills <i>(telephone, utilities, internet, TV subscriptions etc)</i>	\$
	Car <i>(registration, petrol, servicing, insurance)</i>	\$
	Education <i>(school fees, uniforms, books)</i>	\$
	Childcare costs	\$
	Recreation and entertainment <i>(sport, outings, eating out)</i>	\$
	Medical <i>(mediation, doctor, dentist, specialists)</i>	\$
Repayments	Loans, store accounts, rental agreements	\$
Other expenses (provide details)		\$
		\$
Total expenses		\$

## Section 2 – Fund request details

Total amount of funds requested	\$
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If ongoing payments are being requested, please provide the following information.

Payment amount	\$
Payment frequency	Fortnightly      Monthly      Quarterly

Provide details about what the funds are for and how they will benefit the Minor.

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## Section 3 – Bank authority

Please provide details below as authority for a direct credit to be made to your personal bank account. We will call you prior to depositing the funds to confirm your bank details.

Account name	
BSB	
Account number	

## Privacy information

Queensland Public Trustee (QPT) takes privacy seriously and must comply with the Information Privacy Act 2009 (Qld) (IP Act). The IP Act contains privacy principles which set out how QPT handles personal information. Unless required or authorised by law, QPT will only use personal information collected for the purpose for which it was given and for related internal training, management or service improvement purposes as per our Privacy Statement at [www.pt.qld.gov.au/about-us/privacy](http://www.pt.qld.gov.au/about-us/privacy)