

### Vision

A value for money, independent state trustee service dedicated to advancing and safeguarding the rights, interests and wishes of Queenslanders in need of financial management, estate and trust administration and planning support

### Purpose

To provide trusted financial decision-making advocacy, education and services and empower Queenslanders to plan and prepare for key life events

We will do this by:

- Supporting Queenslanders with life-planning assistance and education
- Providing reliable, independent and ethical services that protect our customers' financial wellbeing
- Building a modern, professional and customer-focused organisation
- Providing value and support to our customers and the community

### Mission

Our people-focused approach helps us meet the individual needs of our customers with humanity, respect, integrity and diligence

### Strategic Risks and Opportunities

- Understanding our customers and designing services to meet their needs
- Harnessing the strengths of our people and growing their capability
- Collaborating with our partners and stakeholders, including government and the community to leverage our joint capabilities
- Optimising our innovation and resources to continuously strengthen our governance and integrity frameworks and practices
- Growing resilience, responsiveness and sustainability in a complex and continuously changing social, economic, data-led and increasingly digital environment

#### Customers First



**Deliver an empathetic, customer centric experience**

##### Strategies

- Understand our customers and their changing needs
- Consult with support networks and stakeholders to improve services and delivery channels
- Provide accessible, timely and transparent communication to customers
- Implement business improvements to deliver streamlined services for customers

##### Performance Indicators

- Customer satisfaction as measured by customer satisfaction surveys
- Improvement measures delivered on time and on budget

#### Our People



**Engaged, empowered people, and an employer of choice**

##### Strategies

- Enhance the health and wellbeing of our staff and provide a safe and inclusive workplace
- Build the capability of our people and maximise their potential
- Invest in developing empowered and engaged leaders, in a connected organisation

##### Performance Indicators

- Health and wellbeing as measured by workforce health and safety indicators

#### Integrity and Financial Responsibility



**Financially and socially responsible leadership and governance**

##### Strategies

- Deliver best practice governance in fund management
- Deliver sound financial management to ensure delivery of organisational priorities
- Implement appropriate investment strategies for customers to support their financial wellbeing
- Review and promote our governance frameworks to enhance our commitment to transparency and accountability
- Grow our capacity to meet social and environmental responsibilities
- Ensure complaints management processes are responsive to customer needs and meet industry standards

##### Performance Indicators

- Current and appropriate governance and accountability frameworks and policies as measured by planned reviews and audits including regular reviews of investment strategies
- Customer satisfaction as measured by customer satisfaction surveys

#### Community Care and Engagement



**Engage with our partners and the community to improve quality of life for Queenslanders**

##### Strategies

- Deliver community education to build knowledge about planning for different life stages
- Engage with our partner organisations to protect the rights and interests of adults with impaired capacity
- Build communities by supporting charitable foundations and philanthropy

##### Performance Indicators

- Number of educational events delivered across regions
- Community education is accessible and inclusive
- Improved investment returns for charitable trusts
- Customer satisfaction as measured by customer satisfaction surveys

#### We support the Government's objectives for the community:

- Good jobs: Good, secure jobs in our traditional and emerging industries
  - Better services: Deliver even better services right across Queensland
  - Great lifestyle: Protect and enhance our Queensland lifestyle as we grow
- In particular, our objectives and strategies align with 'Backing our frontline services'

#### Our role and services contribute towards delivering better services, by:

- undertaking a key role in Queensland's guardianship system
- advocating for the rights and financial interests of people with impaired decision-making capacity and protecting them from neglect, exploitation and abuse
- supporting Queenslanders to protect and manage their financial wellbeing at all stages of life
- delivering a customer experience that is tailored, relevant and accessible
- enhancing customer and community understanding of life planning

#### Our work is guided by our Queensland public service values



Customers first



Ideas into action



Unleash potential



Be courageous



Empower people

#### Our commitment to Human Rights

We respect, protect and promote human rights in our decision-making and actions

#### 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