

MINOR TRUST – BUDGET ADVICE FORM

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 – Beneficiary details

Reference number <i>(contained in letter)</i>	
Full name of Minor beneficiary	
Reference located on letter	

Section 2 – Guardian details

Guardian full name	
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Section 3 – Beneficiary financial requirements

The following information is to help identify if any funds will be required from the Trust over the next 12 months for the child's benefit. This information will help to inform the annual budget.

It's important to know items included in the budget will still need to be reviewed prior to approval of payment. Please also be aware that when funds are used from the Trust, there will be less money available to be invested, which will reduce the amount of money available at the end of the Trust.

Additional expenses required over the next 12 months		Description	Amount
Education <i>(fees, computer or other)</i>	Yes	No	\$
			\$
Health <i>(medical expenses)</i>	Yes	No	\$
			\$
Maintenance	Yes	No	\$
			\$
Other	Yes	No	\$
			\$

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