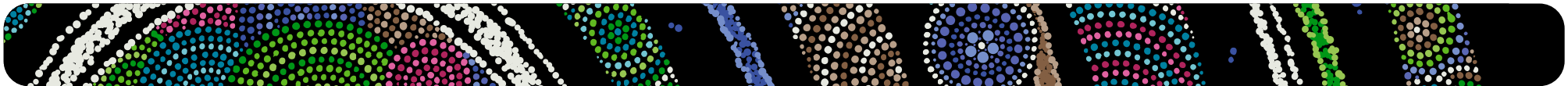


Strategic Plan 2024 – 2028

This strategic plan was reviewed June 2025 and remains current for the reporting period 2025 – 2026.



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 administration, estate and trust administration and support services.

Purpose

To provide trusted and transparent services, advocacy and education, and empower Queenslanders to plan and prepare for key life events. Our people-focused approach helps us meet the individual needs of our customers and the community, with humanity, respect, integrity and diligence.

Our acknowledgment

We recognise and acknowledge Aboriginal peoples and Torres Strait Islander peoples as the Traditional Custodians of Queensland’s land and waters. We pay our respects to their Elders past, present and emerging.

We recognise and celebrate the unique and continuing position Aboriginal peoples and Torres Strait Islander peoples in Queensland’s history, culture and future, and acknowledge their ongoing strength, resilience and wisdom. We are working to translate this recognition into providing inclusive practices, policies and services for Aboriginal peoples and Torres Strait Islander peoples.

Our customers

Objective

Deliver an empathetic service and experience that puts customers first

Measure

Our customers and their support networks are satisfied with the services we deliver and how we communicate with them

Strategies

- Leverage data, insights and research to understand our customers and their changing needs
- Consult with customers, support networks and stakeholders to improve our services and delivery channels
- Provide accessible, timely and transparent communication to customers
- Deliver streamlined and efficient services for customers
- Implement appropriate investment strategies for customers to support their financial wellbeing
- Manage and monitor our fees and services to ensure they are fair, reasonable and transparent
- Ensure complaints management processes are accessible, timely and responsive

Our people

Objective

Engaged, empowered people and an employer of choice

Measure

Our people have the skills and resources they need to perform well in their roles, and demonstrate inclusive, safe and collaborative behaviours

Strategies

- Enhance the health and wellbeing of our people and provide a safe, inclusive and culturally respectful workplace
- Build the capability of our people and maximise their potential, through a culture of continuous learning and self-improvement
- Invest in developing empowered and engaged leaders, in a connected organisation that embraces diversity
- Model high standards of integrity and ethics
- Grow our capacity to meet environmental, social and governance (ESG) responsibilities

Our organisation

Objective

Financially and socially responsible leadership, governance and practices

Measure

Our systems, policies and frameworks enable us to act effectively and efficiently

Strategies

- Deliver best practice governance in fund management
- Manage our resources and investments effectively to ensure delivery of organisational priorities
- Ensure our governance frameworks enhance our commitment to transparency and accountability
- Modernise technology systems, operational models and processes to improve efficiency and meet changing needs
- Monitor and manage risks effectively to minimise their impacts and act on new opportunities

Our community

Objective

Community engagement that informs and empowers the rights, choices and wishes of Queenslanders

Measure

Our communities and stakeholders value and trust our advice, and partner with us to share information and build awareness

Strategies

- Deliver trusted advice and community education to enhance knowledge and awareness to plan and prepare for key life events
- Engage with organisations and stakeholders to support the dignity, rights and interests of adult Queenslanders with impaired capacity
- Ensure information and education initiatives include accessible resources, proactive outreach and inclusive initiatives
- Provide independent and impartial advocacy, to enhance our service delivery and education services

Our challenges

Meeting the increasingly complex and diverse needs of an increasingly large ageing, multicultural and vulnerable community

Changing community needs and expectations about our role and how we deliver services, particularly for people with disability

Social issues such as rising cost-of-living pressures are placing additional pressures on Queenslanders and the services they expect

Attracting, supporting, and retaining a safe, healthy and high-performing workforce and talent pipeline

Sustainably transitioning aged infrastructure to modern offerings and meeting the demands of constant cyber risk and continual technology and digital advances

Our opportunities

► Increasing community education and awareness of advance life planning and financial safeguarding, particularly for Queenslanders experiencing vulnerability

► Service and operating model design anticipating and meeting changing customer base and service need

► Future sustainability as a contemporary, human services agency

► Contemporary capability uplift, empowering our people and benefiting customers

► Modernising systems for more efficient and customer-oriented service delivery

We support Government’s objectives for the community



Queensland Public Trustee contributes to the Government’s objectives for the community by working to provide **a better lifestyle through a stronger economy**, helping to support individuals’ economic security, particularly for Queenslanders experiencing vulnerability. We deliver trusted services and community education to enhance Queenslanders’ knowledge and awareness to enable them to plan and prepare for key life events.

Human Rights

Respect · protect · promote

Our commitment to Human Rights

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

Queensland Public Trustee (QPT) has a proud history of delivering services to Queenslanders.
We have built strong foundations to enhance and evolve the way we support Queenslanders. Through our Customers First focus, and guided by our Structured Decision-Making Framework, we operate with humanity, respect, integrity, and diligence to provide trusted services and support.

Our Strategic Plan sets out QPT’s strategic direction over four years, focusing on four clear objectives for our customers, our people, our organisation and our community.


Our customers
Deliver an empathic service and experience that puts customers first
We are focused on being a customer-centric agency, that puts customers and their support network at the forefront of decision-making, to deliver services that meet our customers’ needs.
We aim to improve our understanding and ability to respond to our diverse customers, so that the services that we design and deliver are accessible, responsive, inclusive, contemporary, fair and cost-effective.


Our people
Engaged, empowered people and an employer of choice
With over 600 staff dedicated to supporting the Queensland community across a network of offices, we invest in our people so that they are engaged and empowered to perform their roles to the best of their abilities.
We seek opportunities to build capability, promote a culture of respect, inclusion and recognition, and support the health and well-being of our people so that we have an equitable, inclusive and respectful workplace.


Our organisation
Financially and socially responsible leadership, governance and practices
Our organisation is focused on providing essential services to Queenslanders in ways that are efficient and effective through modernised systems, contemporary practices and good governance.
We prepare for our future by being responsive to environmental factors (e.g. population, technology, social and economic) to minimise risk and inefficiencies in our service delivery to our customers, our people, our stakeholders and the Queensland community.


Our community
Community engagement that informs and empowers the rights, choices and wishes of Queenslanders
We provide community education and advocacy programs to increase awareness of Will and Enduring Powers of Attorney documents, financial administration, relevant systemic focus areas and key services.
We strive to support the individual needs of Queenslanders through delivery of community engagement activities that respect, protect and promote Queenslanders’ human rights.

Our services


**Financial administration:**
Assisting people with impaired decision-making abilities to manage their financial needs.


**Wills and Enduring Power of Attorney documents:**
Preparing Wills and Enduring Power of Attorney documents, and providing safe and secure storage of these and associated documents, for Queenslanders.


**Estate administration:**
Providing executorial services when acting as executor or administrator of a deceased estate, and assisting private customers to obtain grants of representation for deceased estates through the Queensland Courts.


**Trust administration:**
Providing trustee services for a range of trusts including testamentary and family trusts, and acting as the trustee for charitable foundation trusts.


Specialist services provided within the above services for customers and internally:


Taxation and investment

Real estate


Legal


Disability support

Customer advocacy

Intestacy

Our key strategies and frameworks

**Customers First Strategy 2021 – 2026:**
Ensuring our customers remain the focus of all that we do, and delivering on our commitment to be a sustainable, modern and customer-centric organisation that continuously learns and improves.

**Structured Decision-Making Framework:**
Supporting stronger customer engagement through decision-making that is founded in the views, wishes and preferences of our customers, in consultation with their support networks.

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