

Annual Report **19**  
**20**



# Communication objective

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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 2019–20 is available online at [www.pt.qld.gov.au](http://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](mailto: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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## 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

444 Queen Street Brisbane Qld 4000  
GPO Box 1449 Brisbane Qld 4001



28 August 2020

The Honourable Yvette D'Ath MP  
Attorney-General and Minister for Justice  
Leader of the House  
GPO Box 149  
Brisbane Qld 4000

Dear Attorney-General

I am pleased to submit for presentation to the Parliament the Annual Report 2019-20 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 117 of this annual report.

Yours sincerely

Samay Zhouand

**Acting 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](http://www.pt.qld.gov.au)**

• Disability services  
• Trust administration

**ABN 12 676 939 467**

• Real estate auctions and sales  
• Charitable trusts

# Message from the CEO

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I am pleased to present the Public Trustee Annual Report 2019-20, which provides information about our financial and corporate performance for 2019-20. The Annual Report has been prepared in accordance with the *Financial Accountability Act 2009*. This report outlines the significant achievements of the Public Trustee's dedicated staff over the past twelve months in continuing to enable the delivery of professional, reliable and accessible financial, deceased estate and trust administration services to the people of Queensland.

During the second half of this year, the global impact of the coronavirus pandemic challenged the Public Trustee like many other organisations. Our executive leadership team, supported by staff across the organisation, quickly implemented business continuity arrangements to ensure the ongoing delivery of critical services and support functions. The safety and wellbeing of staff and customers remained our most important priority.

I was impressed with the commitment of all our staff to quickly develop solutions and find new ways of working. Their efforts also provided the driver to accelerate the delivery of a number of planned service and business improvements, including enhanced capability for remote working, new ways for Queenslanders to make a Will by telephone and video-conferencing, and digitisation of records. All regional offices remained open with frontline services transitioning to delivery by email and telephone where possible. We also introduced a toll free telephone number ensuring our customers, including vulnerable Queenslanders, could contact us for essential services.

Despite these challenges, we have continued to provide services that our customers value, achieving positive results in customer satisfaction measures across our primary services - making Wills and Enduring Power of Attorney documents and the delivery of financial, deceased estate and trust administration.

The commencement of the *Human Rights Act 2019* (the Act) was a significant milestone this year. This important legislation protects 23 human rights and requires all Queensland public sector entities act in a way that is compatible with, and considers these human rights in all decisions and actions. To prepare for the commencement of the Act, we established a project board and working group to oversee the completion of a number of initiatives to build a culture of valuing human rights as paramount, and placing the human rights of individuals, especially the most vulnerable, at the forefront of service delivery. We continue to focus on embedding human rights into the organisation.

To continue to advance as a modern, learning organisation committed to human rights, we have introduced a Customers First agenda. The Customers First agenda promotes a long-term, strategic focus on meeting our customers' changing needs. Customers First will continue to underpin our progress towards a future-focused, customer-centric, professional organisation through initiatives that build on community trust, provide greater transparency and ensure the voice of our customers guides our future decision-making.

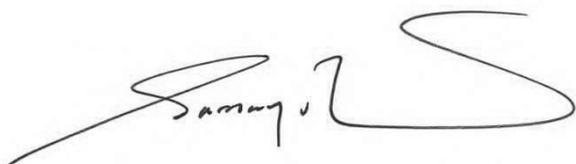
Our Strategic Plan 2020-2024 cements the Customers First agenda and outlines the strategic objectives to achieve our new purpose: *'To enhance and protect our customers'*

*rights, dignity and interests.*' A key strategic objective is to ensure continued financial responsibility and sustainability.

We have already made significant progress in advancing the Customers First agenda including:

- Our Social Responsibility Charter – the Public Trustee has a lead role in representing and assisting the community we serve. Our Social Responsibility Charter includes six guiding principles that outline our responsibilities and defines how we will act and make decisions to achieve our vision to provide security and peace of mind for Queenslanders and be accountable to our customers, our stakeholders and the community
- Reviewing our organisational structure to ensure clarity of roles in customer focused service delivery and corporate support. We have increased support to our regions by appointing dedicated Regional Directors. These roles will ensure our Customers First vision is advanced across all regions for the benefits of our customers, staff and the community
- Establishing reference groups to engage with customer advocacy and government stakeholders – providing a voice for our customers through their support networks and advocacy groups and ensuring we collaborate with other government agencies to implement best practice governance and accountability frameworks.

The past year has been one of significant change at the Public Trustee and I am proud of our achievements. I look forward to the year ahead as we continue to advance as a modern, learning organisation that is committed to human rights and continuous improvement.

A handwritten signature in black ink, appearing to read 'Samay Zhouand', with a large, stylized flourish extending to the right.

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