

Customers
First

Leadership

Financially
Responsible

Engagement

Care for the
Community

Social Impact Report 2020

The Public Trustee





Security & Peace of Mind

For more than 100 years, the Public Trustee has been providing security and peace of mind for Queenslanders.

Our aim is to continue serving Queenslanders by enhancing and protecting their rights, dignity and interests and putting people at the centre of everything we do.

We advocate on behalf of people with impaired capacity and work with the community to provide pathways and opportunities for our customers to live positive, respectful and healthy lives.

Phone **1300 360 044** • Email clientenq@pt.qld.gov.au
For further details, visit www.pt.qld.gov.au

Our Values



- Customers First**
Customer-centric, fair and equitable experiences
- Leadership**
Engaged, empowered and customer-focused workforce
- Integrity**
Socially responsible services that meet the needs of Queenslanders
- Financially responsible**
Financially and ethically responsible leadership and governance
- Engagement**
Engage meaningfully with the community to improve the quality of life of Queenslanders
- Care for the community**
Inclusive with our customers, their support networks and our stakeholders

Contents

- A message from the Attorney-General 4
- A message from the Public Trustee of Queensland 4
- About the Public Trustee 5
- Queensland’s Guardianship System 5
- COVID-19 Response 6
- Our Customers 7
- Our Community 13
- Our Charitable Trusts 19
- Our People 21
- Our Future 23

Please note:
To protect the privacy of individuals and to maintain confidentiality, the names and any details for the images and case studies have been de-identified. Aboriginal and Torres Strait Islander readers are warned that photographs within this report may contain images of deceased persons, which may cause sadness or distress.

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.

A message from the Attorney-General

I am pleased to launch the Public Trustee's Social Impact Report 2019 – 2020. The Public Trustee has been serving Queenslanders for more than 100 years, providing essential services for the Queensland community, and protection for those experiencing vulnerability, such as the elderly and those with impaired capacity.

Over the last 12 months, the Public Trustee has undergone rapid and significant change. The new Customers First Agenda sets out a commitment to Queenslanders to offer exceptional services that keep the customer at the centre of all they do.

This is evident through the Public Trustee's investment in community education pathways and programs for Queenslanders to have greater accessibility to information, to be actively engaged in decision-making and empowering independence wherever possible.

The Social Impact Report reflects the real-life experiences of Queenslanders and outlines the impact on our community. I look forward to bringing you further updates in the coming years.

The Hon. Shannon Fentiman MP
Attorney-General and Minister for Justice, Minister for Women and Minister for the Prevention of Domestic and Family Violence

A message from the Public Trustee of Queensland

At the start of my second year as the Public Trustee of Queensland and CEO, it is my pleasure to share our first Social Impact Report. In the past twelve months, the Public Trustee has undergone rapid change and adopted a more customer-centric business model to ensure a long-term strategic focus on our customers and their changing needs.

To meet the challenges of the next decade, our mission is to become a more modern, customer-centric, professional, ethical and sustainable organisation that provides valuable services for Queenslanders.

This year we established the Public Trustee’s *Strategic Plan 2020 – 2024*, developed our first Social Responsibility Charter, and implemented a Customers First Agenda.

Our vision is to continue providing security and peace of mind for Queenslanders, and we will achieve this by driving continuous improvement, building on community trust, providing greater transparency and ensuring the voice of our customers guides our decision-making.

By developing the Social Responsibility Charter we made a promise to our customers, our people and our community that the Public Trustee will be mindful of its responsibilities and will proactively contribute to society by being a trusted, transparent, consultative, customer and people-focused organisation.

The Public Trustee’s long-term focus requires exemplary governance that is grounded in the continuity of our values and geared towards providing quality support for customers by respecting the law and ethical standards, upholding the Queensland Public Service Code of Conduct, and communicating with and committing to our customers and stakeholders.

Along with the introduction of the *Human Rights Act 2019* and amendments to the *Guardianship and Administration Act 2000* and the *Powers of Attorney Act 1998*, the Public Trustee is delivering on its commitment to put people at the centre of all we do, and we are dedicated to making a difference to the lives of those we serve.

Samay Zhouand
Acting Public Trustee of Queensland and CEO

About the Public Trustee

The Public Trustee is a Statutory Authority with the purpose of enhancing the dignity, rights and interests of Queenslanders. The Public Trustee provides a free will-making service for all Queenslanders — in fact we are one of the largest will-makers in the Southern Hemisphere. In the 2019 – 2020 financial year, we provided over \$38.4M in community services as part of our endeavour to serve the Queensland community.

In addition to our free will-making service, we provide Queenslanders with enduring powers of attorney services. We administer deceased estates including the auction and sale of property. The Public Trustee also holds unclaimed money for Queenslanders in circumstances where an organisation has lost touch with the owner of the funds.

We help Queenslanders experiencing vulnerability and we are often appointed as financial administrator for those who have impaired capacity and no-one else to help them manage their money. The Public Trustee helps to manage investments and trusts for beneficiaries who are minors or have a disability.

We also act as Trustee for a number of philanthropic trusts and organisations, such as the Queensland Community Foundation, the Forde Foundation and the Queensland Aboriginal and Torres Strait Islander Foundation.

As a self-funded organisation, we receive no government funding. While we are able to offer free will-making services, we charge reasonable and transparent fees for all other services, as well as rebates for those experiencing hardship. We offer our services to those who need them, and we encourage Queenslanders to consider other professional organisations to assist them in making an informed choice about their future, and the future of their loved ones. We have more than 600 public service professionals working with the Queensland community across a number of locations around the state.

The Public Trustee has been serving Queenslanders since 1916 and will continue to provide security and peace of mind for Queenslanders, and respected, valuable services for the Queensland community into the future. Reporting to the Queensland Parliament through the State's Attorney-General, the Public Trustee forms an important part of Queensland's guardianship system.

Queensland's Guardianship System

Queensland's guardianship system protects the rights and interests of adults who have an impaired capacity to make their own decisions.



Public Trustee

a self-funding statutory authority that provides enduring powers of attorney, free Wills, and investment, executor and financial administration services to Queenslanders.



Queensland Civil and Administrative Tribunal (QCAT)

an independent, accessible tribunal that efficiently resolves disputes on a range of matters. The Tribunal's purpose is to provide a quick, inexpensive avenue to resolve disputes between parties and make decisions.



Office of the Public Guardian (OPG)

a body that works independently to protect the rights and interests of adults with impaired decision-making capacity.



Public Advocate

an independent statutory appointment who undertakes systemic advocacy to promote the rights and interests of people with impaired decision-making capacity and their protection from neglect, exploitation and abuse.

COVID-19 Response



Like so many organisations in Queensland, the Public Trustee has been impacted by the global COVID-19 pandemic. Our Executive Leadership Team, supported by staff across the agency, quickly implemented business continuity arrangements to ensure we could continue to deliver critical services and support functions for our customers.

A COVID-19 Response Plan was developed as a supplement to the Public Trustee's existing Business Continuity Plan and actions to mitigate potential business continuity risks resulted in new initiatives and innovative solutions for customers and staff.

To help ensure the Public Trustee provided the safest possible environment for our customers and staff during the height of the pandemic, we:

- Encouraged interactions via phone, email or post, rather than face-to-face
- Arranged for staff to work from home or alternative locations, to reduce the risk of exposure to the virus
- Called customers prior to scheduled appointments to check they had not been in contact with the virus
- Increased our regular cleaning schedule and hygiene practices, and asked customers and staff to use hand sanitiser before entering offices
- Provided daily updates to staff
- Increased our digital capacity to enable staff to work from home and customers to receive more digital communication
- Developed new work processes whereby staff in regional areas can assist customers in other regional centres via phone and email.

The safety and wellbeing of our staff and customers remains our most important priority.

— ENABLED —
75% staff
to work from
HOME
in less than 2 months

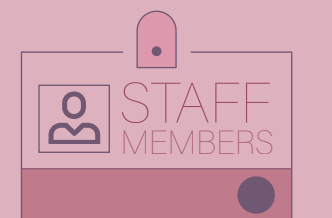


ACHIEVED
an average

from staff about their satisfaction with the work from home arrangement.

WE NOW SUPPORT
ON AVERAGE

100



EACH DAY
(approximately 15% of workforce)
to work remotely across the state



Over the last 12 months our online services increased due to COVID-19



to understand the process of:

- probate
- estate administration
- their role as an executor

through web content, knowledge-based web articles and online media statements.

Our Customers

Our customers come from all walks of life and from across all areas of our state. Our services and programs are fundamentally aligned to the notion that the Public Trustee is uniquely placed to make a positive difference to the lives of Queenslanders. We do this through our enduring powers of attorney and Wills services and financial, estate, trust administration and other essential fiduciary services.

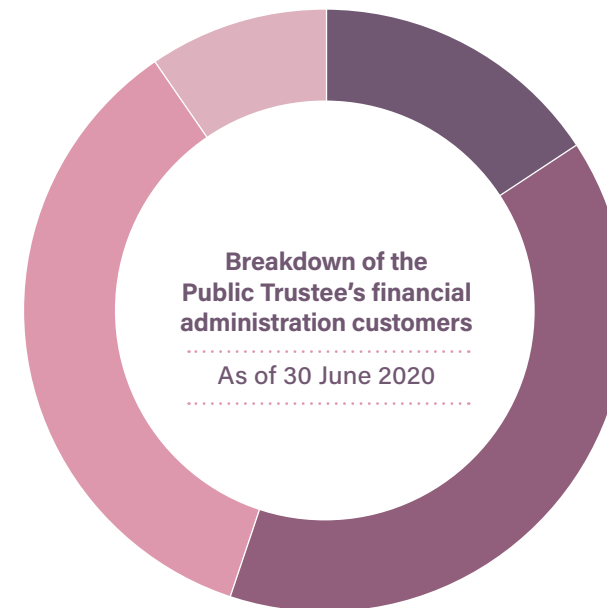
We are mindful of our responsibilities to our customers and their communities, and that is why we are increasing our focus on our social impact. We want to support our customers to meaningfully engage with the guardianship system, and support their independence and positive engagement with the Queensland community.

The Public Trustee has embraced the *Human Rights Act 2019* and is focused more than ever on advancing Queenslanders' human rights through our service delivery. That is why we have introduced our Customers First

Agenda, which is fundamentally about delivering a customer experience that is tailored, relevant and accessible to Queenslanders; and importantly, focuses on fairer outcomes and transparency.

Our frontline Trust Officers located throughout Queensland are building strong relationships with our customers and responding to the needs of their communities. Customer satisfaction continues to be our priority and we appreciate all customer feedback.

As part of our Customers First Agenda, the Public Trustee has begun working with a Customer Reference Group to ensure the voice of the customer drives our continuous improvement and change. Consultation with the group provides feedback that is passed on to the Public Trustee's internal working groups, so we can develop and implement new improved ways of working.



Helping customers gain their entitlements

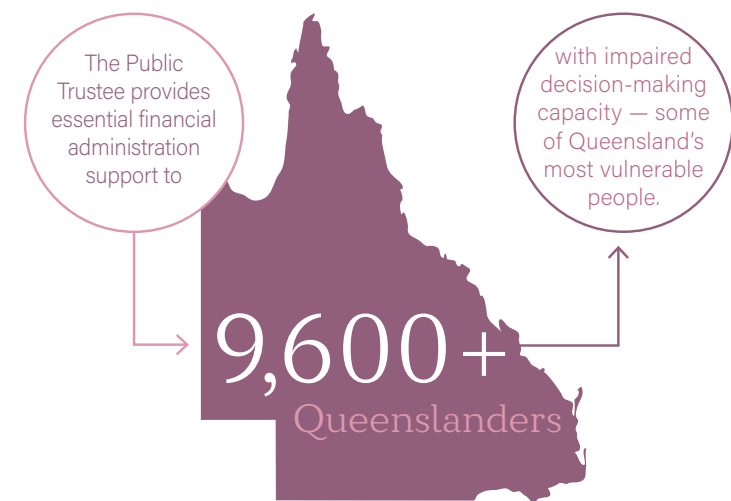
The Public Trustee works with our customers to understand their financial needs, develop a budget and solutions that are appropriate for their individual circumstances and help them to connect with the community. Each customer is allocated a dedicated Trust Officer to provide them with personal help and assistance.

Our Trust Officers work with customers and their network of stakeholders (including banks) to consolidate or waive debts and to advocate for fairer outcomes. Cases of a complex nature are referred to the Public Trustee's Government Benefits team.

In the last 12 months, the Government Benefits team responded to more than 17,000 enquiries resulting in:

- Aged Care Advice for 240 customers regarding individual aged care options
- \$860,000 in Income Support Payments and Aged Care fee adjustments for our customers.

Supporting Customers with Financial Management



In 2016, the Queensland population was estimated at **4.85 million**

According to Queensland's Chief Health Officer, approximately **18%** of Queenslanders reported having a disability

6% having a severe or profound disability

Data taken from Australian Census 2016 www.abs.gov.au/census

2019 **28%** of the Public Trustee's customers identified as living with an intellectual disability, or living with a psychiatric disability.

The Public Trustee recognises that it is vital to provide services that are accessible and responsive to the needs of our customers, including customers with a disability. For this reason, the Public Trustee collaborates and partners with other government agencies and community organisations to deliver accessible services to our customers, helping them to connect with the community and reach their full potential.

Barry is 71 years old and has dementia. Sadly, his former Attorney took advantage of his condition before the Public Trustee was appointed as his administrator. Barry received a notice from Centrelink that he had been overpaid more than \$50,000 in his age pension. The Public Trustee's Government Benefits team worked with the Department of Human Services to have Barry's debt waived and his pension was reinstated.

Sally is 65 years old and sustained a traumatic brain injury in a car accident two years ago. She had not updated her assets with Centrelink, which caused a reduction in her age pension for more than 18 months. When the Public Trustee was appointed as her administrator, our Government Benefits team worked with Sally and Centrelink to correct her records, including providing evidence that her assets had been disposed of. As a result, Sally received a refund of more than \$20,000 and reinstatement of her full pension entitlements.

The Public Trustee doesn't just support customers to access their entitlements in Australia. We recently supported a customer to have their German pension reinstated, which resulted in a back payment of \$68,000.

Helping customers gain financial independence

Under our Customers First Agenda, our goal is to empower our customers to gain the skills and information to manage their finances either independently or with limited support.

In 2019 – 2020, the Public Trustee introduced a Financial Independence Pathway, a program that provides practical guidelines to support our Trust Officers to educate, support and empower our customers to manage their money to a greater capacity.

The Financial Independence Pathway helps our customers to learn and practise the skills needed to manage their own finances by teaching them how to create and manage their own budget as well as pay their own bills. This initiative is also helping to identify more customers who can be guided and who are capable of being transitioned to managing their own finances.



Meet Richard

Richard, who lives with a cognitive disability, has worked with his support network to gain financial independence.

When the Public Trustee was appointed by the Queensland Civil and Administrative Tribunal (the Tribunal) to support Richard in making decisions about his finances, he began working with his Public Trust Officer and broader support network to manage his budget.

After just one year of support and assistance from his Public Trust Officer, the Tribunal recommended the Public Trustee give Richard more control over his money. Richard was very excited about the possibility of regaining his financial independence.

Richard was supported to set up a savings account and internet banking, and gain an understanding of how to manage his budget.

With increasing confidence, Richard was able to apply to the Tribunal to regain full control of his finances. Richard explained to the Tribunal how he was managing his money, including his personal expenditure.

The Tribunal found that Richard was now able to manage his own money and that he knew how to ask for help if he needed it.

Richard's case is a great example of what can be achieved when the Public Trustee works with a customer towards a common goal to increase control of their financial wellbeing.

Case Study:
Financial Independence Pathway

Deceased Estates

The passing of a loved one can be a difficult and emotional time for families and loved ones. The Public Trustee acts with compassion, kindness and integrity and we work with beneficiaries and stakeholders to finalise the administration of estates.

The Public Trustee is one of the largest administrators of estates in Queensland and as of 30 June 2020, was administering 2,141 estates, worth a total value of approximately \$476 million. We provide an end-to-end service including the preparation of property for sale, real estate services, conveyancing and distribution of proceeds to beneficiaries.

The Public Trustee provides estate administration services to Queenslanders who have:

- nominated the Public Trustee as the administrator of their Will
- died intestate (died without a valid Will) or
- died in other circumstances, where a Court appoints the Public Trustee as administrator.

Due to the complex nature of intestate estates, families and legal practitioners frequently refer matters to the Public Trustee for their expertise.

The Public Trustee's Intestacy Entitlement Unit (IEU) is responsible for researching and confirming relatives entitled to a share of a deceased person's estate under Queensland's intestacy laws. Sometimes this can be a simple process, but when there are complications, or overseas research is required, the IEU's specialist family tree researchers can spend months or years tracking down the rightful beneficiaries of a deceased estate.

The IEU supports more than 150 cases each year where someone has died intestate and had no known beneficiaries at the time of death. Sometimes tracking down the rightful beneficiaries of an unclaimed deceased estate, can result in reuniting families or informing people of relatives they didn't know existed.



Meet George & Monique

One afternoon, George received a call from the Public Trustee that he didn't expect. He was advised that his sister, Marie, who George hadn't seen for more than 40 years, had recently passed away. He was also informed that unfortunately she had died without a valid Will, known as dying intestate, and he appeared to be the only known next of kin, possibly making him the only beneficiary of Marie's estate.

Initially, the Public Trustee was informed that Marie, who originated from England, had no surviving family. According to those who knew Marie well, her spouse and only child had died more than 40 years ago.

The Public Trustee's researchers explored the National Archive and discovered that Marie and her brother George had immigrated with their

parents to Australia in 1955. They managed to locate George in Queensland and made contact with him. The next step was to confirm the death of Marie's spouse and child. After thorough investigation, the team discovered that Marie's daughter Monique was still alive and well, and living in Queensland.

The Public Trustee's researchers were able to inform George that not only did he have a niece, but she was living within a short distance from him. George, who had no children of his own, described finding his niece as the most precious gift.

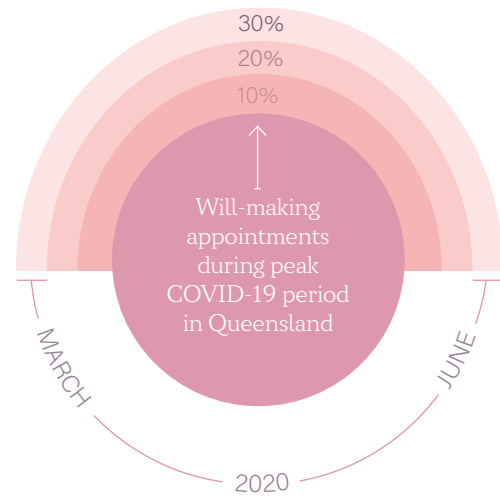
Case Study:
Intestacy Entitlements Unit

Wills and Enduring Powers of Attorney



The Public Trustee makes over 24,000 Wills for Queenslanders at no cost each year, and prepares more than 2,550 enduring powers of attorney to help protect Queenslanders and ensure their loved ones understand their wishes in the event they pass away or lose capacity.

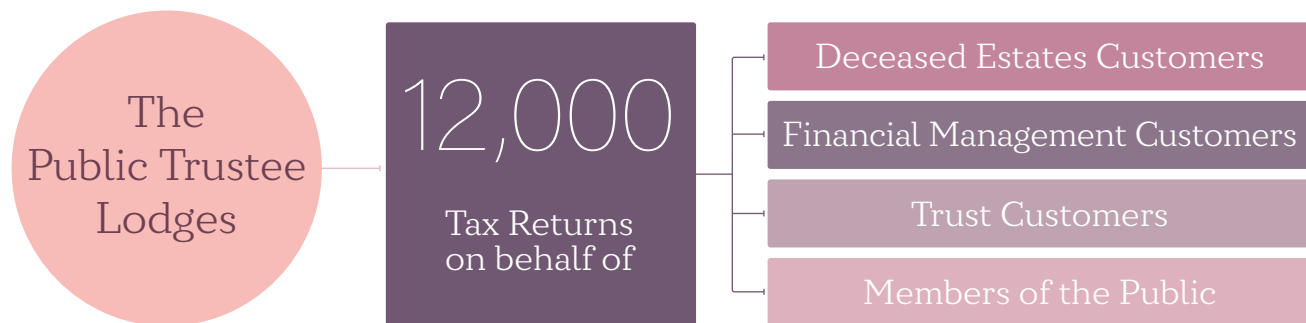
In the 2019 - 2020 financial year, the Public Trustee gained a customer satisfaction rating of 95 per cent for will-making services. During COVID-19, our customers were assisted via the phone wherever possible, in order to limit face-to-face contact. Appointments for our will-



making service increased by 30 percent between March and June 2020.

The Public Trustee also provides an outreach service for people who are unable to leave their home or hospital due to a disability or an illness, and they wish to make a Will or enduring power of attorney. Raising awareness about the importance of having a valid Will, and making sure it's as easy as possible for Queenslanders to update their wishes is an important role for the Public Trustee within our community.

Taxation Services



The Public Trustee's Taxation Unit was established to provide taxation services and advice to the Public Trustee and our customers. This is a vital service that provides support for deceased estates and people with impaired capacity. In addition to the number of tax returns lodged, the Taxation Unit manages more than 10,000 tax related matters each year on behalf of customers, including the provision of Taxation Advice and the preparation of Capital Gains Cost Base Summaries for the sale of properties.

It is increasingly common for customers to hold a number of investments and often family members are unfamiliar with taxation requirements when a loved one passes away or becomes incapacitated.

Without our taxation services, many of our customers would need to seek specialist advice to fulfill the requirements of estate administration.

The Public Trustee has a Complex Structure team operating within Taxation Services. This team provides assistance to customers and helps them navigate the often complex compliance requirements and processes associated with entities such as Self-Managed Superannuation Funds, Family Trusts, Partnerships, Companies or Joint Ventures.

Unclaimed Money

The Public Trustee holds more than \$160 million in unclaimed moneys, which is remitted by businesses, organisations and deceased estates where the owner cannot be located. The unclaimed money comes from a variety of sources, such as utility companies, real estate agencies, pawnbrokers and investment companies.

A dedicated team at the Public Trustee reunites customers with their lost funds by identifying the person claiming, and then paying the lost funds to them.

The Public Trustee has been safeguarding unclaimed money since the 1960s. For the 2019 - 2020 financial year, the Public Trustee assisted 2,879 customers to reclaim their lost money, with the average claim being approximately \$1,600. The highest amount claimed in the financial year was \$523,218.

Unclaimed moneys for the 2019 - 2020 financial year

Number of Claims	Average Claim Amount	Total Amount of Claims Paid
2,879	\$1,600	\$4,622,766

A new interactive guide is one of the latest initiatives from the Public Trustee's Customers First Agenda, developed to help make it easier for customers to navigate the claims process through the Public Trustee's unclaimed money portal.

Feedback from our Customer Reference Group indicated the unclaimed money application forms could be simplified to make it easier for customers to complete their claims correctly and efficiently online.

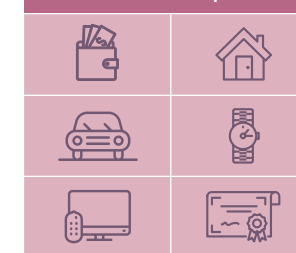
In 2019 - 2020, the Public Trustee assisted



With more than 240 claims received each month from Queenslanders searching for unclaimed money through the Public Trustee's website, it's important this process is as easy as possible, saving time for customers and increasing customer satisfaction.



A trust can comprise of:



Trusts

The Public Trustee manages more than 4,300 trusts each year, including trusts held on account of minors until they reach a certain age. A trust is a way of holding assets (such as money, property, shares, jewellery or even household items) for the benefit of a person or a particular purpose.

Trusts can be set up when making a Will or by a living person establishing a trust to provide for beneficiaries at a certain time of their life, throughout their lifetime, or for a specific purpose. Trusts are held by a legal trustee who is responsible for administering the trust for the benefit of the beneficiary.

The Public Trustee works with guardians and beneficiaries to manage and administer trust funds on behalf of our customers. During COVID-19, there was an increase in parents and caregivers who reached out to the Public Trustee to access funds for home schooling and purchase items such as laptops, iPads and smart phones. Maintaining the Public Trustee's essential services throughout the pandemic was critical for those caregivers and families who experienced loss of income and unexpected expenses.

Our Community

The Public Trustee has a rich history built around serving Queenslanders and providing support to those who need it in our community.



As we have grown, the Public Trustee has remained steadfast in its commitment to provide security and peace of mind to Queenslanders.

Community Education

Raising awareness about the importance of advance life planning through community education programs is an important role of the Public Trustee. As part of our community engagement strategy, the Public Trustee provides speaker talks to community groups and

attends expos and community events, partnering with organisations such as Council on the Ageing, the Department of Communities and the Queensland Law Society.

Each year, the Public Trustee hosts Queensland Wills Week to raise community awareness.

2019
21 community
EVENTS

were hosted by the Public Trustee across the state



Community Service Obligations

In 2019 – 2020 the Public Trustee reported a record contribution of more than \$38 million in Community Service Obligations.

Each year the Public Trustee gives back to the community through our Community Service Obligations (CSOs) at no cost to the Queensland Government or the public. Our CSOs have significantly grown over the last 30 years to a record \$38.4 million in the 2019 – 2020 financial year. More than 76 per cent of our CSOs are used to assist customers experiencing vulnerability by providing rebated fees for those with limited assets.

Since 1992, the Public Trustee has contributed more than \$500 million in Community Service Obligations to the people of Queensland.

Category of Community Service Obligations	2019 – 2020 Actual \$M
Fees rebated for clients with limited assets	\$29.2
Fees rebated for principal residence and other	\$0.8
Management of estates of prisoners	\$0.6
Public community education and advice to the courts and tribunals in the areas in which the Public Trustee has expertise	\$1.5
Providing a free will-making service to all Queenslanders	\$4.8
Cash contribution to the Office of the Public Guardian	\$1.2
Civil Law Legal Aid — outlays written-off and administrative support	\$0.3
Total	\$38.4

Wills Week 2020

In 2020, in light of COVID-19, we recognised Queensland Wills Week in the safest possible way for everyone — in a digital format. The theme of Queensland Wills Week 2020 was “Make your wishes known”, with the goal of educating Queenslanders on the importance of documenting their wishes through a valid Will.



This year we partnered with the Queensland Law Society to promote and distribute a range of social media and information online about how to make a Will, an enduring power of attorney or an Advanced Health Directive.

Social media posts were designed and shared across the Public Trustee's three social media platforms.



Genealogy Requests

The Public Trustee recognises that there is an interest within the Queensland community for information on family histories and has a mechanism to assist families with access to documents sought for genealogical research.

Deceased estate administration records are retained on a permanent basis with the Queensland State Archives and are an invaluable resource for family history enquiries.

The Public Trustee is also the responsible agency for legacy records relating to the financial management of patients confined to institutions.

In the last financial year, the Public Trustee received and processed 33 genealogical requests from family members

Genealogical requests made to the Public Trustee have resulted in:

- the provision of background family medical history from confined patient records
- identification of unclaimed moneys and potential claims
- identification of missing beneficiaries and the re-opening of estates for administration.

Aboriginal and Torres Strait Islander family estate research

The Public Trustee assists the Department of Aboriginal and Torres Strait Islander Partnerships (DATSIP) to review the deceased estates of Aboriginal people whose financial affairs were controlled under the *Aboriginals Preservation and Protection Act 1939* (repealed) and whose estates were transferred to the Aborigines Welfare Fund rather than being distributed. As outlined in the *Queensland Government Response to the Stolen Wages Reparations Taskforce report, Reconciling Past Injustice*, the Queensland Government is reassessing deceased estates and distributing funds to beneficiaries as a matter of priority.

The Public Trustee also assists the DATSIP Home Ownership team by providing historical information. In the 2019 – 2020 financial year, the Public Trustee processed 104 requests from DATSIP for historical and family information in relation to Aboriginal and Torres Strait Islander estates.



Finding Joe's Family

When Joe died in 1998, he was a leaseholder under the Land Holding Act. Joe's land is located in his local community. It is still in his name and has not been transferred to his family members. The DATSIP Home Ownership team is working with the Public Trustee to identify and locate Joe's family members in North Queensland.

To date, ten family members have been identified and two members have been located. To assist with locating the rest of Joe's family members, DATSIP will try to make contact with beneficiaries while they are travelling in the region. If they are successful, the Public Trustee will be able to complete the transfer of the leasehold.

Case Study:
Working with the DATSIP Home Ownership Team

Helping Protect Our Community

The Public Trustee plays a lead role in educating the community about elder abuse and advocating on behalf of victims.

Elder Abuse

Elder abuse can take many forms. This includes financial, physical, psychological, sexual and neglect. The Public Trustee works with government agencies and organisations to help raise awareness about elder abuse prevention, because it is vital that, as a community, we value and protect the rights of ageing Queenslanders.

Each year, the Public Trustee is appointed to manage the finances of thousands of vulnerable Queenslanders with impaired decision-making capacity who have unfortunately fallen victim to misappropriation of funds through elder abuse. It is a sad reality but the majority of cases of financial elder abuse involve direct family members, trusted friends or caregivers, or those who have been appointed as an enduring power of attorney, when someone loses capacity. The misuse of an enduring power of attorney is a serious matter, and a grave abuse of trust.

In many cases the Public Trustee advocates on behalf of victims of financial elder abuse to help them recoup some, or all of their money. We will continue to advocate for the rights and protection of elderly Queenslanders.

In 2019 – 2020 the Public Trustee opened 2,122 legal files for customers, including 120 files investigating Family Provision Claims and 50 relating to misappropriation of funds.

Serving Our Community

Over the past five years, the Public Trustee has returned more than \$52 million to Queenslanders in moneys received from criminal proceeds. In 2019 – 2020, we paid approximately \$6.35 million to Queensland Treasury from the proceeds of forfeited property.

The Public Trustee administers property restrained or forfeited under the *Criminal Proceeds Confiscation Act 2002*, when ordered by the court to do so.

Together we can stop Financial Elder Abuse

Each year the Public Trustee helps thousands of Queenslanders experiencing vulnerability with reduced decision-making capacity, and we advocate on behalf of those who have fallen victim to the misappropriation of funds.

In October 2019, the Public Trustee and the Public Guardian's involvement led to the arrest of a person who defrauded an 85-year-old woman of nearly \$3 million. The elderly woman was incapacitated after suffering a stroke and the 77-year-old perpetrator was her attorney.

Educating and helping people to understand how to protect themselves when they make an enduring power of attorney is an important part of elder abuse prevention.

Case Study:
Advocating for victims of financial elder abuse

Our Charitable Trusts

The Public Trustee supports five leading philanthropic Charitable Trusts in Queensland. As the Trustee for these charities, we are responsible for the administration, investment and distribution of funds on their behalf.

Lady Bowen Trust

The Lady Bowen Trust is a Charitable Trust, managed by the Public Trustee of Queensland, which partners with existing charities to assist Queenslanders who are homeless and have complex needs, to build a better future. Established in 2006, the Trust partners with established charitable organisations, such as Mission Australia, to provide targeted and flexible support and grants to people who need it. Often these grants are small in material value but they make a huge difference to people's lives. An example is the purchase of a washing machine, which replaced a three hour round trip that a mother of three was making, multiple times a week, to a laundromat via public transport. Over the last 15 years, thousands of Queenslanders have benefited from the distribution of more than \$1.5 million in grants through community partners.

In 2020, the Public Trustee managed more than \$5 million in funds for Lady Bowen Trust and distributed more than \$200,000 to Queenslanders.

Gladstone Foundation

The Gladstone Foundation was established to manage voluntary contributions paid into a trust by liquefied natural gas companies QGC Pty Limited, ConocoPhillips (Australia Pacific LNG) and Santos (Gladstone LNG). The Public Trustee of Queensland is the Trustee of the foundation and has the ultimate responsibility for the investment and distribution of funds.

Established as a perpetual Trust in 2011, the Gladstone Foundation's goal is to enhance the liveability of Gladstone communities by providing social infrastructure and service needs in the Gladstone region to ensure the needs of the region's growing population are met.

In 2020, the Public Trustee managed more than \$6 million in funds for Gladstone Foundation and distributed more than \$660,000 to benefit the local community.

Queensland Community Foundation

The Queensland Community Foundation (QCF) provides a permanent source of philanthropic funding for charitable organisations in Queensland through a perpetual fund. Donations and bequests to QCF help build capital to create a sustainable grants program for the Queensland community. The Public Trustee has been QCF's Trustee since its inception in 1997, and in 2019 – 2020 we helped distribute more than \$3 million to charitable organisations including \$500,000 in grants to grass roots causes to assist them with vital capacity-building operations. With \$94 million currently under management, the Public Trustee has worked with QCF to distribute more than \$28.8 million throughout Queensland since it began.

In 2020, the Public Trustee managed more than \$94 million in funds for QCF and distributed more than \$3 million to Queensland charities.

The Forde Foundation

The Forde Foundation was established in August 2000 in response to the findings of the *Commission of Inquiry into Abuse of Children in Queensland Institutions*, better known as the Forde Inquiry. The foundation provides a small grants program to former residents of Queensland institutional care, in specific areas such as dental, health and wellness, and education and employment-related training. In 2020, the Forde Foundation celebrated its 20 year anniversary, improving the quality of life for Forgotten Australians. Since commencing, 5,657 grants valued at more than \$3.27 million have been provided to improve the quality of life for people who were in the care of Queensland institutions or foster care as children.

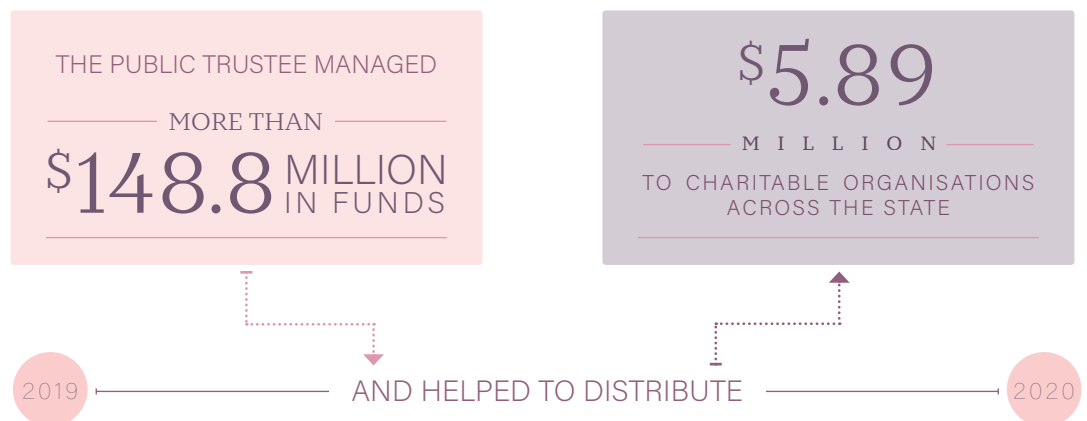
In 2020, the PT managed more than \$3.85 million in funds for the Forde Foundation and distributed more than \$117,000 to Queenslanders.



Queensland Aboriginal and Torres Strait Islander Foundation (QATSIF)

The Queensland Aboriginal and Torres Strait Islander Foundation (QATSIF) is a charitable trust established in 2008, providing young Aboriginal and Torres Strait Islander Queenslanders with secure funding through scholarships to assist them in gaining their QCE (Queensland Certificate of Education). The scholarships are funded by the interest from unallocated stolen wages. By the end of 2020, QATSIF will have provided scholarships for more than 12,000 Aboriginal and Torres Strait Islander students across Queensland. A record number of applications for scholarships have been approved for next year, worth more than \$3.65 million in funding.

In 2020, the Public Trustee managed more than \$40 million in funds for QATSIF and distributed more than \$1.9 million to Queenslanders.



Our People

The greatest strength of our agency is our people. The Public Trustee has some of the most dedicated, longest-serving, and hardest-working people in the Queensland Public Service. We have a diverse workforce with the overall gender profile comprising 75 percent female and 25 percent male employees.

Essential work is being undertaken every day at the Public Trustee — work that delivers a significant impact on the lives of thousands of Queenslanders every year.

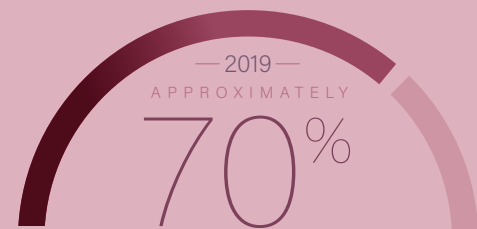
The Public Trustee continues to be a leading equal rights employer

OVERALL GENDER PROFILE COMPRISING:

75% female employees

25% male employees

More than 8 out of 10 employees perform frontline and frontline support roles.



of the Public Trustee's executive leadership team were represented by women.

The Public Trustee is also a proud employer of people who identify as being Aboriginal or Torres Strait Islander.

The Public Trustee currently has **11 employees** who identify as Aboriginal or Torres Strait Islander

We are committed to creating career pathways for Aboriginal and Torres Strait Islander people.

The Public Trustee is also a leading employer of people living with a disability.

IN 2019 APPROXIMATELY

4% of employees identified as having a disability

This is above the average in the Queensland Government of **2.84%**

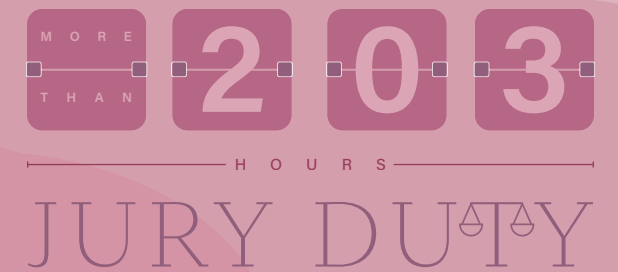
Queensland Public Sector State of the Sector March 2020 — Public Service Commission

Giving Back to the Community

Public Trustee employees continue to give back to the Queensland community through volunteering activities. The Public Trustee has established its very own team for employees to donate blood or plasma to Australian Red Cross Life Blood.



2019 – 2020 Public Trustee employees contributed



The Public Trustee continues to support a number of major charities and events including Foodbank, Australia's annual food drive.

Our Future



In late 2019, the Public Trustee launched our Customers First Agenda, providing the framework for advancing Human Rights and enabling the Public Trustee to be a more modern, socially and financially responsible organisation that puts customers at the centre of everything we do.

As part of the Customers First Agenda, and in pursuit of continuous improvement, the Public Trustee implemented a range of important Customer First initiatives and a new streamlined customer-focused and service delivery-oriented functional structure.

A dedicated Ethics and Integrity Unit was established to play an integral role in increasing trust and transparency across the agency. In addition, a Board of Management was established, which is supported by a revitalised Executive Leadership Team and Operational Performance Group. This has resulted in improved information sharing, evidence-based decision-making, and assistance to rebuild trust and confidence across the organisation.

Over the last 12 months, with the implementation of the *Human Rights Act 2019* on 1 January 2020, the Public Trustee has been focused on embedding a deep understanding of human rights across the agency. Our leadership team and employees are committed to:

- building a culture that protects and promotes human rights
- respecting the rights, interests and opportunities of our customers
- promoting a dialogue about the nature, meaning and scope of human rights and fundamental freedoms
- placing the human rights of individuals, especially the most vulnerable, at the forefront of our service delivery.

This year, the Public Trustee launched its first Social Responsibility Charter as part of our commitment to continuous improvement and transparency. The Social Responsibility Charter outlines how our commitment to our customers will be delivered, including the key values, principles and the behaviours we will exhibit. This was a natural progression for our Customers First journey, as the values enshrined in the Charter go to the heart of our Customers First Agenda.

An important milestone for the Public Trustee this year was the development and release of the *Strategic Plan 2020 – 2024*, which has been built around the six principles in our Social Responsibility Charter. This approach reflects our commitment and social responsibility to our customers, employees and Queensland as a whole.

The new Strategic Plan is the Public Trustee's commitment to enhance and protect the rights, dignity and interests of customers as the key purpose of our financial, estate, trust and other essential fiduciary services for Queenslanders. It guides us and enshrines our commitment to the pursuit of continuous improvement, as we meet the needs and interests of the Queensland community.

In today's modern world, it is essential that organisations such as the Public Trustee put a relentless focus on continuous improvement. We are a learning organisation, and together, our staff are dedicated to finding better ways to deliver our services and meet the needs of our customers and stakeholders.

Our focus for the future requires exemplary governance that is grounded in the continuity of our values and geared towards providing support for our customers by:

- respect for law and ethical standards
- communication with and commitment to our customers and stakeholders
- commitment to the principles of the *Queensland Public Sector Ethics Act 1994*.

Our commitment to meet our Human Rights obligations ensures the interests of our customers are at the forefront of our service delivery and underpins our new vision and purpose outlined in the *Strategic Plan 2020 – 2024*. This commitment reflects the ongoing critical role that the Public Trustee will continue to play in providing for the community.

Our mission is to continue to innovate and improve as we become a more modern, customer-centric, professional, ethical and sustainable organisation that provides valuable financial administration services for Queenslanders.



Enhancing and protecting the rights, dignity and interests of
Queenslanders by putting people at the centre of everything we do.