

Annual Report **20**

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Communication objective



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 2020–21 is available online at 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

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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Content from this annual report should be attributed as: The Public Trustee of Queensland annual report 2020–21.

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



31 August 2021

The Honourable Shannon Fentiman MP
Attorney-General and Minister for Justice,
Minister for Women and Minister for the Prevention of
Domestic and Family Violence
GPO Box 149
Brisbane QLD 4001

Dear Attorney-General

I am pleased to submit for presentation to the Parliament the Annual Report 2020-2021 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 113 of this annual report.

Yours sincerely

Samay Zhouand

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

• Disability services
• Trust administration

ABN 12 676 939 467

• Real estate auctions and sales
• Charitable trusts

Message from the CEO

It is my pleasure to present the Public Trustee Annual Report 2020-2021.

We have produced this Annual Report in accordance with the *Financial Accountability Act 2009*, providing information about our financial and corporate performance for 2020-21.

This report demonstrates our commitment to our vision to provide security and peace of mind for Queenslanders. It also outlines our contribution to the Government's objective to back our frontline services, including our role in Queensland's guardianship system.

Our activities in 2020-21 – detailed in this report - were firmly focused on our Customers First Agenda, innovating in how we support and communicate to our customers and ensuring our stakeholders are informed and involved. Our continued transformation to a customer-centric culture was driven by our Customers First Agenda and our Social Responsibility Charter.

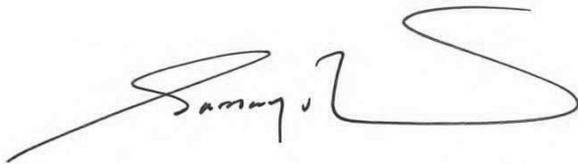
We have appreciated the input and support we received from our strategic partners, including the Public Advocate, as we continue to transform the way we operate. Their advice has been helpful in identifying areas where we can improve our service delivery and our implementation of a range of initiatives, including a comprehensive review of fees and charges.

In 2020-21, our achievements have included:

- Our five-year Strategic Plan 2020 – 2024 was launched in July 2020, outlining our strategic challenges and key opportunities, along with our Social Responsibility Charter and commitment to upholding human rights in our decisions and actions.
- Our Customers First Strategy 2021-2026, released in February 2021, set out our commitment to tangible actions and deliverables to advance the Customers First Agenda over the next 5 years.
- Our first Social Impact Report was delivered in February 2021, measuring our ongoing impact and positive changes achieved for Queenslanders.
- Development of an Easy English package, which focuses on communication that uses everyday words, simple sentences and supporting images, improving the way we engage with our customers and how we provide important information to customers and understand their needs.
- Introduction of a National Redress Scheme Unit to support customers who have experienced institutional child sexual abuse to make a claim through the National Redress Scheme.
- New products for financial management customers including the “tap and go” card and a redesign of financial plans and statements to make them clearer and easier to understand.
- Supporting financial management customers through the Public Trustee's Financial Independence Pathway program to regain control of their finances, with eight individuals achieving independence in 2021.
- Adoption of a Structured Decision-Making Framework, as part of changes to the *Guardianship and Administration and Other Legislation Amendment Act 2019*, which places customers at the heart of decisions that will impact them and their support network.

- Implementing and embedding a Public Trustee Integrity Framework based on honesty, objectivity, ethics and accountability.
- Partnering with the Queensland Law Society in September 2020 to deliver a fully digital campaign, as a response to COVID-19, for Wills Week to raise awareness and community education about will-making and advance life planning.
- Enhancing our complaints management framework to ensure our processes are fair and responsive to the needs of our customers.

In the past 12 months, we have renewed and re-strengthened our focus on service delivery, educating our communities about advance life planning, and protecting older Queenslanders from elder abuse. I am proud of the hard work of our team of Public Trustee employees serving Queenslanders across our 15 regions, in a year when the pandemic continued to make its mark and required us to be ever more agile in how we delivered services.

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

Samay Zhouand

Public Trustee of Queensland and Chief Executive Officer (CEO)