



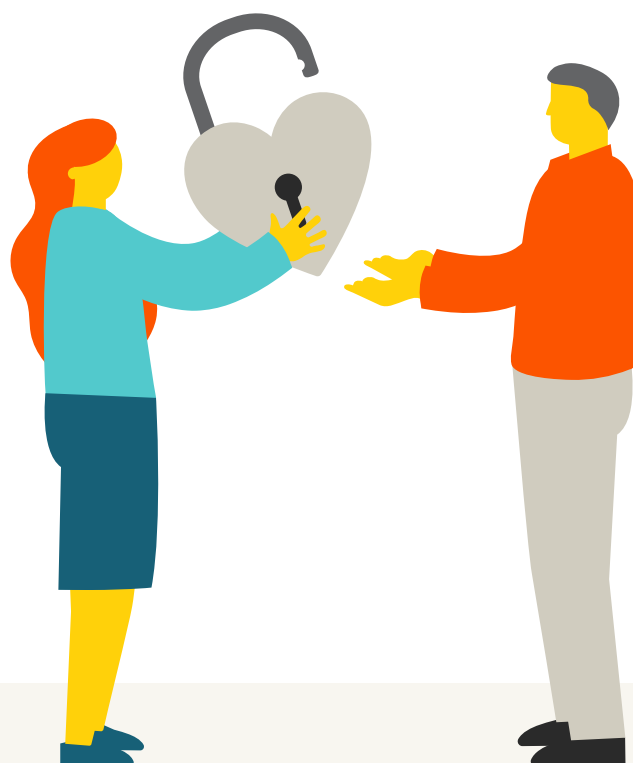
Financial attorney services

Protect your financial
wellbeing, with support
when you need it most.

Not sure where to start to appoint a power of attorney?

We're here to make it easier to understand and develop a plan that's right for you.

We offer a range of personalised services to protect your assets, respect your wishes and ensure your best interests are always placed above anything else.



What is a financial attorney?

A financial attorney is someone who you have nominated to deal with your legal and financial affairs, if you were to lose capacity due to illness or injury, or if you just wish for assistance with some financial tasks.

To nominate a financial attorney, you must complete a document called an enduring power of attorney before you lose capacity.

By appointing Australian Unity Trustees as your enduring power of attorney, we'll manage your affairs on your behalf once you become unable to do so.

Why do you need to appoint a financial attorney before you need one?

For Australian Unity Trustees to act on your behalf once you can't, you must execute an enduring power of attorney while you have capacity.

Executing an enduring power of attorney is important. If you suffer sudden illness or incapacity without it, there'll be no official person to protect and manage your legal and financial affairs.

Without an appointed financial attorney, you are likely to need a court or tribunal appointed financial administrator.

What can a financial attorney do on your behalf?

A financial attorney can help manage your affairs by:

- Collecting and responding to your mail
- Collecting your income
- Dealing with banks and institutions like Centrelink, Medicare and insurance companies
- Managing and paying your bills
- Managing your investments
- Managing and maintaining your property
- Completing your tax returns

Who can be appointed as your financial attorney?

Some people appoint a family member or a friend to act as their financial attorney, without realising the time and expertise needed to manage your legal and financial affairs when you're no longer able to.

For this reason, many people appoint a trustee company such as Australian Unity Trustees to act as their financial attorney. We will always act in your best interest and in line with the legal requirements.

What about lifestyle and medical decisions?

Australian Unity Trustees is uniquely placed to offer you high quality financial attorney services.

However we are unable to make lifestyle or medical decisions on your behalf. In our role as your financial attorney we would liaise with your appointed guardian or support network in relation to those decisions.

Why Australian Unity Trustees?

We have an unwavering commitment to the highest duty of care. As a trustee company, it's our job to put your best interests first, every time.



A team you can trust

Our team are highly experienced and genuinely care about you and your circle of support.



Supported by a mutual organisation

We're Australia's first member-owned company, with over a 180-year heritage.



Personalised service

We offer a boutique style trustee service, with the resources and backing of Australian Unity.



We're here to help

Visit our website or speak to our friendly team to find out if our financial attorney services could be right for you.

1800 878 783

australianunity.com.au/wealth/protect-your-assets/financial-attorney

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