



Financial administration

Support with your affairs
when you need it most.

As a financial administration provider, it's our job to put your needs first.



For over 25 years, we've successfully administrated the affairs of thousands of Australians.

What is financial administration?

If a person is unable to manage their own affairs, due to age, disability or other personal circumstances, a financial administrator is appointed to act on their behalf by a Court or Tribunal if they do not hold a valid Enduring Power of Attorney.

An administrator protects assets and manages the finances for the benefit of the person under administration.

How does it work?

As a financial administrator, we ensure the client's will and preferences are at the forefront of all decisions made on their behalf, and their finances are managed in line with their needs.

We provide a dedicated client relationship manager who also works with our client's support network to ensure we provide the best care and answer any questions on an ongoing basis.

What can an administrator do on your behalf?

The financial tasks we can perform on your behalf include:

- Developing a budget to help meet your needs
- Protecting your assets
- Identifying and collecting all income due to you
- Arranging payment of your expenses
- Buying or selling assets as appropriate
- Managing all legal matters for those based in Victoria
- Liaising with your service provider
- Liaising with your family and support network to ensure your needs are met

How does the administrator decide how much money I receive for my living expenses?

It's our responsibility to manage your finances in your best interests. We will work with you to develop a budget that meets your financial needs and spending preferences.

How can I access my funds?

Your client relationship manager will arrange for a regular and appropriate sum of money to be deposited into your personal bank account. If you need additional funds, you can make a request to your client relationship manager.

How will my service providers know they should deal with you, not me?

We'll contact your service providers and financial institutions to advise them of our role. Then all correspondence and accounts will be redirected to our office so we can arrange payments on your behalf, as required.

How long do I need an administrator for?

An administrator is usually appointed for a maximum of three years in Victoria, however it may vary by state, after which a reassessment is conducted by the tribunal. The reassessment may be conducted prior to the end of an administration period if appropriate.

What are our fees?

Fees for administration services vary according to your circumstances and needs. The tribunal that makes the initial order sets out the fees and includes them in the order.



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 administration service could be right for you.

1800 878 783

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

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