



**Financial administration**  
based on integrity,  
experience and trust



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We are here to help  
people thrive

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## What is a financial and legal administrator?

A financial and legal administrator is appointed by a tribunal using a specific order under the relevant legislation. They manage the financial and legal affairs on behalf of people who can no longer do so themselves.

### Frequently Asked Questions

#### 1. Why does Australian Unity have control of my money?

Australian Unity Trustees has been appointed to assist you with the management of your financial and legal affairs. We have responsibility for ensuring your income is received, expenses met and assets protected.

#### 2. How can I access my funds?

You will have a Client Manager assigned to the management of your affairs. They will arrange for a regular and appropriate sum of money to be deposited into your personal bank account for you. If you need additional

funds, you can make a request to your Client Manager for their consideration.

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

It is our responsibility to manage your finances in your best interests, and we will prepare a budget to ensure your needs will be met.

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

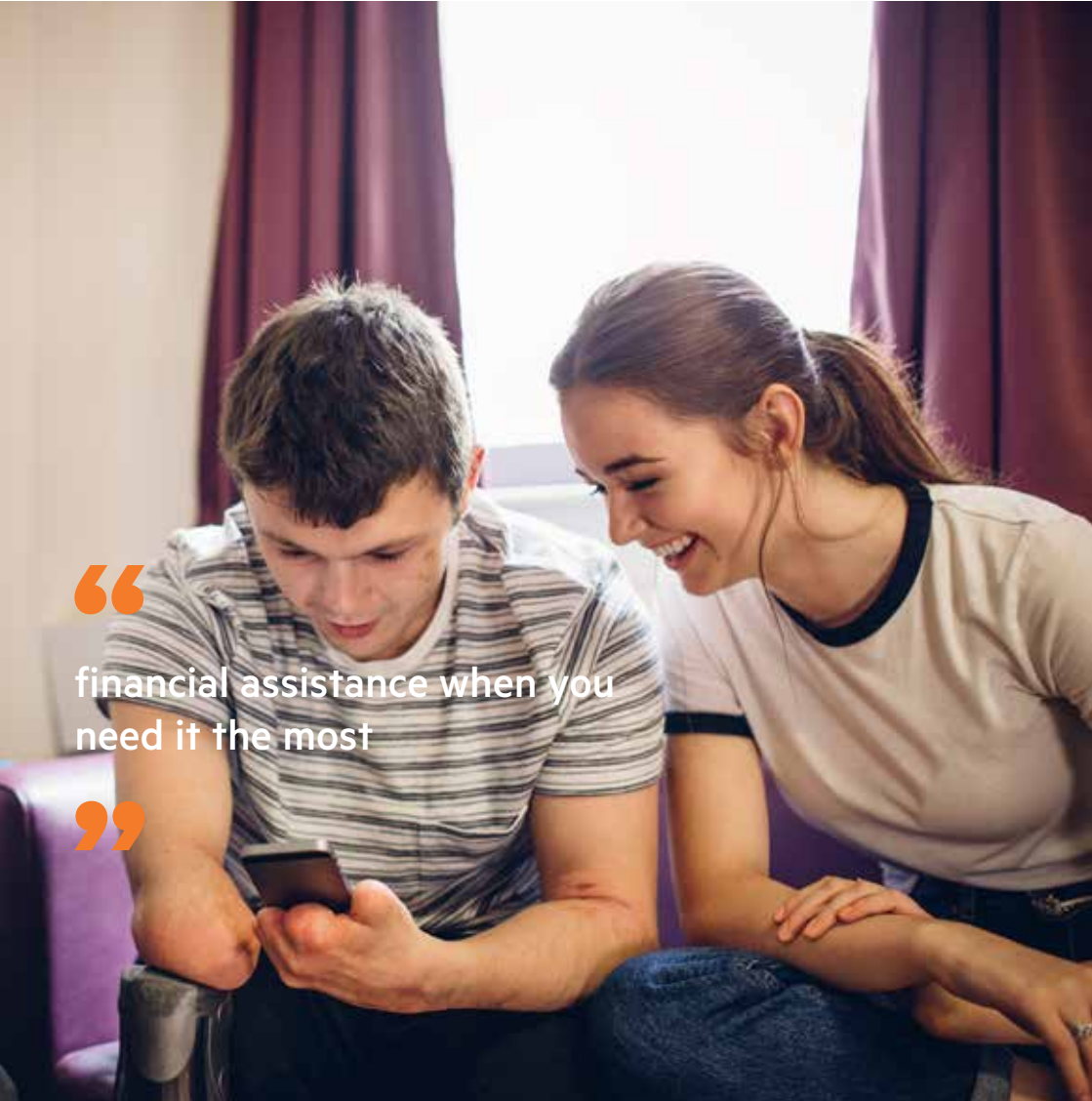
We will ascertain the service providers and financial institutions you engage, and we will then contact those companies and advise them of our involvement. We will have all correspondence and accounts redirected to our office so we can arrange payments on your behalf as required.

#### 5. How long do I need an administrator for?

An administrator is usually appointed for a maximum of three years, following which a reassessment is conducted by the tribunal. The reassessment may be conducted prior to the end of an administration period if appropriate.

#### 6. What are our fees?

Fees for administrative order services vary according to the client's circumstances and needs. The tribunal that makes the order sets the fees and includes them in the order.



“ financial assistance when you need it the most

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## We will deliver certainty and peace of mind when we become your financial and legal administrator

We specialise in estate planning and administration, and have done so since 1995 under the Flinders Australia banner .

This experience and focus, combined with our 175 year heritage of community service and prudent financial advice, means we are uniquely placed to offer you high quality financial and legal administration services.

As your financial and legal administrator, you can rest assured we will always act in your best interests.

It's in our DNA to do so.

Since 1840 we have always placed our clients' best interests above anything else. That is the commitment we offer you as your financial and legal administrator – a commitment backed by the full resources of our organisation, one of Australia's leading financial services groups.

As a result, you can be assured of the most appropriate financial assistance when you need it the most.

After all, your financial wellbeing is at the heart of everything we do.



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It is a privilege for us to be asked to assist people

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## Our commitment to you and your family

We have administered the financial and legal affairs for thousands of Australians. It is a privilege for us to be asked to assist people who due to their age, disability or personal circumstances no longer have the capacity to manage their own financial and legal affairs.

It is a responsibility we do not take lightly, and we will do everything we can to ensure our client's best interests are at the forefront of all decisions made on their behalf and their finances are managed in line with their needs.

Our commitment to our client is unwavering and far reaching, and includes providing them with a personalised service headed by an experienced and dedicated Client Manager. Our client and their support network has direct access to the Client Manager.

We will take the time to understand the client - their situation, their needs and their wishes.

We will also liaise with our client's family, if appropriate, to ensure they understand our client's wishes and the administrative process, and answer any questions they may have.

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one of Australia's leading financial services groups

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## Financial and legal administrator tasks

There are many tasks we will perform on your behalf on an ongoing basis, including:

- Developing a budget that will ensure all of your needs are met
- Protecting all your assets
- Identifying and collecting all income due to you
- Ensuring all your expenditure is met
- Buying or selling assets as appropriate
- Managing all legal matters
- Liaising with your service providers

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Long before there was any formal welfare system, members relied on the support and benefits of mutual organisations

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## A proud history

With more than 175 years of helping our members thrive, Australian Unity is proud to continue supporting the lives of a million Australians.

We trace our roots back to December 7, 1840—in a pub on Melbourne’s Queen Street. It was at the inaugural meeting of the Manchester Unity Independent Order of Oddfellows that a newspaper proprietor, a surgeon, a chief constable, a glazier and a carpenter would build the foundations of what would become Australian Unity.

Over the decades, many dozens of other friendly societies and like organisations have joined or merged with Australian Unity. The Australian Natives’ Association, Big Sky Credit Union, Lifeplan Australia Friendly Society and many others are now part of Australian Unity. We carry on the traditions that formed these organisations.

Long before there was any formal welfare system in Australia, members relied on the support and benefits of these mutual organisations.

Today, we still aim to answer the very simple question that our members have always had: how can I provide for myself and for those I love, especially in times of need?

The environment that we currently operate in is one where chronic disease is on the rise, we have an ageing population and a need to increase retirement savings.

We believe a member-based mutual organisation is the best way to look after your interests and those of the broader community.

We’re a national healthcare, financial services and independent and assisted living organisation with 7,000 employees providing services to one million Australians.

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## Our services



### Health

- Health insurance
- Overseas visitors cover
- Dental services
- Chronic disease management
- Hospital in the home



### Wealth

- Investments
- Philanthropy
- Trust and estate administration services
- Financial planning
- Investment, education and funeral bonds
- Banking and home loans
- General insurance



### Living

- Aged care and accommodation
- Personal and business insurance
- Aboriginal home care
- Disability services
- Retirement communities



**1800 87 87 83**



**[australianunity.com.au/trustees](https://australianunity.com.au/trustees)**