



Trustee services for all Australians

The financial wellbeing of you and your family is at the heart of everything we do



“

We are here to help people thrive

”

Our trustee services have been designed for all Australians

Australians trust us to assist in managing and protecting their assets.

While some people mistakenly believe that trustee or fiduciary services are only for the wealthy, Australian Unity Trustees is a contemporary trustee company for all Australians seeking to protect their assets now and into perpetuity. While still being grounded in the tradition of our heritage, we provide for the wellbeing of our clients in line with their needs.

With today's changing landscape, it is becoming increasingly commonplace to appoint an independent trustee company to assist either at times of vulnerability or need such as during the administration of an estate.

Australian Unity Trustees brings independence, impartiality and breadth of experience. We can assist clients to prepare documents in advance to protect them and their assets or we can take on an attorney, trustee, executor or administrator role where someone has already lost capacity or passed away.

It is a privilege for us to be asked to assist people in these ways; it is a responsibility we do not take lightly. We will do everything we can to ensure your best interests are considered paramount and respected.

We will take the time to understand you – your situation, your needs and wishes. We will then develop a solution in line with your needs.

Should your wishes or personal situation change over time, or if the legislative framework in which we work changes, we will work with you to update your financial and legal documentation accordingly.

It is a personalised service based on experience and strong empathy for you and your family.

By selecting Australian Unity Trustees to act on your behalf if you lose capacity, when you pass away or in any other trustee role, you have peace of mind knowing that we have taken the time to listen to you and act in your best interests and in line with your wishes.

We hold ourselves to a higher standard: An unwavering commitment to the highest duty of care

As a trustee company, we always place our clients' best interests above anything else.

It is 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 and legal assistance when you need it the most, whether you require estate planning or administration, financial and legal administration, or trust establishment and administration.

We have helped tens of thousands of Australians in these important matters and we have always done that – and we always will – with an unwavering commitment to the highest duty of care.

This experience, assurance and focus, combined with our 175 year heritage of community service and prudent financial advice, means we are uniquely placed to offer you personalised services to protect your assets, ensure your wishes are met and your best interests are always placed above anything else.

Our trustee services include:

Estate planning including advice and document preparation

Estate administration (as the executor, or as the assistant to the executor)

Taking on the role of financial attorney in the event that you lose capacity to ensure independent management of your wealth

Financial and legal administration for those who can no longer manage their financial and legal affairs themselves

The establishment and administration of trusts, including protective trusts, minor's trusts and charitable trusts

A young man with dark hair, wearing a light-colored shirt, is carrying a young woman with long dark hair on his back. Both are smiling broadly. They are outdoors, with a beach and ocean in the background. The woman is wearing a pink and blue top. The man is wearing a light-colored shirt. The background is a bright, slightly overcast sky and a sandy beach with waves in the distance.

“

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

”

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.

Disclaimer: This information has been produced by Australian Unity Trustees Ltd (“AUTS”) ACN 162 061 556. AFSL 483220. Any advice in this document is general advice only and does not take into account the objectives, financial situation or needs of any particular person. It does not represent legal, tax, or personal advice and should not be relied on as such. You should obtain financial advice relevant to your circumstances before making decisions. You should seek specialist advice from a tax professional to confirm the impact of this advice on your overall tax position. Nothing in this document represents an offer or solicitation in relation to securities or investments in any jurisdiction. Where a particular financial product is mentioned, you should consider the Product Disclosure Statement before making any decisions in relation to the product and we make no guarantees regarding future performance or in relation to any particular outcome. Whilst every care has been taken in the preparation of this information, it may not remain current after the date of publication and AUTS and its related bodies corporate make no representation as to its accuracy or completeness. Published: June 2019 © Copyright 2019

Our services



Health

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



Wealth

- Investments
- Estate planning
- 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