

Public Trustee Now

Will you be leaving a digital footprint?

It is a modern-day dilemma; as consumers we welcome the convenience of doing everything online from emailing and banking, to shopping and socialising. However what will become of this digital footprint when we are gone?

Getting your affairs in order

should include developing a personal strategy for managing your digital assets. Minimising the administrative overhead, as well as the emotional distress on your loved ones can

In order to gain access to another person's online accounts or simply close them down can be an involved and lengthy process as service providers seek to ensure appropriate identification standards are met.

Providing instructions

on how you would like your digital footprint to be treated can be helpful too. For example, Facebook offers users the option of having their profile memorialised following death.

So to ensure your digital footprint is managed as you wish, the solution can be as simple as recording a list of your online accounts and telling someone. You should also consider discussing the best method of dealing with your digital assets when preparing your Will or Enduring Power of Attorney.

For further information on managing your social media digital footprint, Palliative Care Australia has published a helpful resource *Guide to Social Media Afterlife*. Find it online at www.palliativecare.org.au

Are we in your area next?

Public Trustee's head office is located in Adelaide's Victoria Square, however each month we visit a number of other metropolitan and regional locations to bring our Will-making and Enduring Power of Attorney services to you.

To find out what areas we will be in next, please call us on **8226 9204** or visit www.publictrustee.sa.gov.au/news

be achieved by carrying out a digital asset audit.

Consider recording your account names and passwords,

securing this information appropriately and telling family or a trusted friend of the storage location in the event you lose mental capacity or pass away.

Service terms and conditions of digital accounts vary enormously with regards to ownership and transferability on death.



Professional estate planning starts with having *a valid Will*

Over a decade on and the tragic loss of Peter Brock, Australia's motor racing legend, continues to attract media reports due to an invalid Will and the legal battle that has followed.

Media has reported Mr Brock used a do-it-yourself Will kit, however due to incompleteness there was doubt as to its validity.

Having a valid and up to date Will not only gives you peace of mind, but also leaves clear instructions on how your assets and finances are to be distributed according to your wishes. It is an important document that should be completed with an experienced Will-making specialist.



When life changes; update your Will.

Marriage, divorce, the arrival of children and grandchildren, and the buying and selling of property and shares are all very good reasons to ensure your Will reflects your most current circumstances.

It doesn't need to be complex.

To make a Will the law simply requires that you are 18 years of age or older and mentally competent. Regardless of what you own and what its monetary value may be, if your personal belongings mean something to you then you may wish to have a say in who receives them when you are gone.

If you die without a valid Will and don't have any living relatives that can be identified or contacted, after a statutory period of six years your estate is paid to the Department of Treasury and Finance as unclaimed money under South Australian law.

We can help you.

Public Trustee prides itself on its professional Will-making services and has been a specialist in the industry for over 130 years. To enquire about this service or to make a Will appointment please call us on 8226 9204.

We will come to you

For South Australians who are infirm and unable to visit a Public Trustee office, an appointment for making a Will or Enduring Power of Attorney can be held in an individual's home, hospital or similar. To ensure an individual is eligible for these services, please call us on **8226 9204**.





Who will manage your finances if you can't?

Ensuring the welfare of your own finances is an important step to having your affairs in order.

Making an Enduring Power of Attorney (EPA) can certainly help to reduce the challenges of what can already be a stressful situation when you;

- ✦ no longer are able to manage your personal finances due to loss of mental capacity, or
- ✦ do not wish to do so due to personal life circumstances such as travelling overseas or experiencing ill-health for example.

An EPA is a legal document which gives a person or an organisation the power as 'Attorney' to manage your assets and financial affairs while you are alive. Once deceased, the role as Attorney ceases immediately and

the Executor named in your Will becomes responsible for managing your affairs.

When selecting an Attorney there are some key considerations. The person or organisation will have significant power over your affairs and unfortunately financial abuse is a growing statistic in South Australia. Therefore the Attorney you choose should be:

- ✦ trustworthy to make decisions in your best interest and obey your instructions
- ✦ capable and available to manage your affairs responsibly
- ✦ willing to assume the role.

An Attorney's role can be to manage the whole of your finances, or specific assets, income, and/or legal matters only. They can pay your bills such as electricity, telephone and accommodation fees, through

to managing more complex matters such as property, the sale of real estate, and investments.

At Public Trustee we manage and administer the finances of over 4000 customers, either as the appointed Attorney, or as the Administrator under an Order issued by the State's Civil and Administrative Tribunal or as a Manager under a Court Order.

When acting as the Attorney, Public Trustee manages all aspects of a customer's financial affairs with a high degree of knowledge, experience and care. Dedicated officers are assigned to ensure each customer's wishes are respected and their finances are protected.

Further information, including Public Trustee's EPA-making services, can be found at www.publictrustee.sa.gov.au/wills-services/power-of-attorney

Life's unpredictable, but making a Will gives you peace of mind to make the most of it.

Good to go

public trustee Government of South Australia

Make a Will with Public Trustee today.
www.publictrustee.sa.gov.au

About Us

Public Trustee was established in 1881 and is a multi-disciplinary Government Business Enterprise offering a range of services in Will-making, estate management and financial administration to the South Australian community.

Public Trustee is responsible for generating its own income and pays a dividend to the State Government.

Under the *Public Trustee Act 1995*, Public Trustee can act as a trustee, executor of a Will, administrator of an estate (both during a person's lifetime or at death), manager, receiver, committee, curator, guardian, next friend, agent, attorney, or stakeholder.



**The Public Trustee,
Debra Contala**

Our Services

Our services are varied, specialised in nature and include Wills, Enduring Power of Attorney, Executor services, Trusts, Personal financial administration and Tax returns.

Public Trustee services involve:

- ✦ offering a general information service about managing your financial affairs
- ✦ making and storing your Will
- ✦ acting as Executor of your Will and distributing your estate according to your wishes
- ✦ assisting you to act as Executor for a deceased estate
- ✦ making and acting as your Enduring Power of Attorney and ensuring your financial affairs are well managed during your lifetime
- ✦ acting as trustee for minors, adults and charitable trusts
- ✦ completing tax returns
- ✦ managing the financial and legal affairs for people who are unable or no longer wish to manage their own affairs
- ✦ examining and regulating the accounts of private administrators (under a legal Order).

Contact Us

- ☎ General (08) 8226 9200
- ☎ Appointments (08) 8226 9204
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