



# PROFESSIONAL PARTNERSHIPS

FINANCIAL MANAGEMENT SERVICES  
FOR YOUR INJURED CLIENTS



**Equity Trustees**

Incorporating



Australian Executor Trustees

**1300 133 472**

**[eqt.com.au](http://eqt.com.au)**



Choosing a professional partner to help manage compensation payments is a big decision for your clients. Clients not only want someone they can trust, they want someone they can rely on to help them now and into the future.

## WHO IS EQUITY TRUSTEES?

Equity Trustees is a contemporary specialist trustee company. Our core business is our traditional trustee services allowing us to do what we do best, which ultimately enables us to provide an excellent client experience. We are always looking for continuous improvement and work hard with our business partners to ensure better outcomes for you and your clients.

Equity Trustees has a national presence with offices in Brisbane, Melbourne, Adelaide, Sydney and Perth.

## EXPERIENCE YOU CAN TRUST

Equity Trustees was founded on trust in 1888, acting as trustee for generations of families and individuals. Trust remains at the heart of everything we do. We manage \$3.5 billion on behalf of 1,086 clients who are under a legal disability. As an independent trustee (including court/tribunal appointed administrator) our role comes with considerable responsibility. As an independent trustee, we work with the highest duty of care, engaging with you and your client. Whether it's buying a house, modifying a bathroom or helping plan for a well-deserved holiday our Client Relationship Managers at Equity Trustees are always there for your clients.

## OUR PHILOSOPHY

We value empathy in all our client interactions. This is the foundation of our belief that we can only achieve the best outcome when we partner with your client and their support network – the people who know and love them best: Their family and carers.

## WORKING COLLABORATIVELY

We are committed to working with your clients, their families and carers to facilitate a better quality of life for them and help them achieve their goals. We do so by taking a flexible and prudent approach to administration and by being inclusive and respectful. We consult with clients and their family members collaboratively for decision making, while being conscious of our role to protect the injured client's best interests.

## ALL PART OF OUR SERVICE

In addition to assisting with the development of their financial strategy, Equity Trustees can also help them access the care and support they need (including assistance with NDIS eligibility). We can take care of all their day-to-day affairs, including engaging carers and treatment providers, or accessing government funding for care and support. We can also advise on the purchase of a home, vehicle, equipment, and insurance.



"Equity Trustees and I have a number of clients in common. These clients are people who have received a compensation payout after being involved in an accident and have experienced quite traumatic events which have turned their lives upside down. Equity Trustees manages the financial affairs of these clients, while I work on their physical rehabilitation. It's very comforting for the client to know their finances are all taken care of and the only thing they need to worry about is leading the best life they can."

*Occupational Therapist*

"My daughter acquired a brain injury after a car accident left her temporarily without the ability to walk or talk. She couldn't manage by herself and needed support – especially in managing the compensation payment she received.

Equity Trustees is appointed as her trustee. They take care of everything from paying her physio bills, her children's school fees, family holidays, and general house maintenance. All the while they continue to ensure her trust funds are managed in order to support her lifestyle now and well into the future, when I will no longer be here to assist her. We consider her Trust Manager, Avalon, to be an important addition to maintaining the wellbeing of our safe and happy family, which makes our lives so much simpler."

*Mother*

## OUR TEAM

The Equity Trustees team brings a combined total of more than 100 years of working with families to manage their compensation payments. Your clients will be provided with the contact details of a dedicated Client Relationship Manager – including their direct office number and direct email.

An important part of delivering a superior service is taking the time to first understand your client's needs. Once the relationship with the client is established, we settle into a more regular rhythm and routine. Together with the dedicated Client Relationship Manager, we'll determine how often we are in contact, based on our experience and the client's wishes.

Over the course of 130 years, we have worked with clients with a range of injuries, varied levels of capacity and have different needs and circumstances. Our Client Relationship Managers show insight, demonstrate flexibility, and maintain a high degree of empathy. We draw on our experience, empathy and expertise, and we engage additional assistance or support when it's needed.



### **KATRINA HARPER**

National Manager, Health and Personal Injury

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Katrina joined Equity Trustees in September 2016 as a Trust Manager. With more than 25 years' experience in the legal and trustee industry, Katrina brings with her a wealth of experience and passion that enables her to achieve the right outcomes for her clients. Katrina is known for her strong values of respect, tolerance, and compassion. Combined with active listening and effective communication, she brings a disciplined, yet flexible, approach to her work.

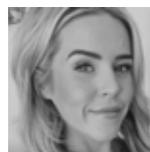


### **SUSAN BARRETT**

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What will always matter to us – and what has enabled Equity Trustees to stand the test of time – is the quality of the care we show each other. We show care not just in our personal interactions, but in the technical and service support which works behind the scenes to ensure our clients and their assets are secure and services are structured to suit individual needs.



**IAN WESTLEY**  
Executive General  
Manager, Trustee and  
Wealth Services

## ABOUT US

Equity Trustees was established in 1888 for the purpose of providing independent and impartial trustee and executor services to help families throughout Australia protect their wealth. As one of Australia's largest and oldest listed independent trustees, we offer a diverse range of services to individuals, families and corporate clients including asset management, financial advice, estate planning and philanthropic services.

In 2022, Australian Executor Trustees (AET) joined the Equity Trustees group of companies, expanding our network of offices into all major cities, and the capability of our specialist teams. Together we share a deep commitment to our purpose of helping people take care of the future.

Equity Trustees Wealth Services Limited (ABN 33 006 132 332) AFSL 234528 and Australian Executor Trustees Limited (ABN 84 007 869 794) AFSL 240023 are part of the EQT Holdings Limited (ABN 22 607 797 615) group of companies, listed on the Australian Securities Exchange (ASX:EQT).

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