

THE SUPPORT YOU NEED FOR THE LIFE YOU WANT

As your life and circumstances change, you often need help from family and friends to help you manage your affairs, such as look after your house when you're away or help you organise your finances. Trust Lifestyle Care (TLC) is a personal and financial administration service also designed to help make your life easier.

Whether you are approaching retirement, have already retired, are a busy executive or would like to free up your time from paperwork and the administration of your affairs, Trust Lifestyle Care can help you keep on top of things.

Services can be tailored to suit your circumstances. They include:

- Organising bill payments and mail collection
- Managing the paperwork for your insurance and tax returns
- Organising property maintenance and management (including rental collection)
- Services for travellers and expatriates
- Organising care for children and elderly relatives
- Provision of power of attorney services
- Custodial services for your investments

We can also coordinate with Trust's other businesses on your behalf to provide other additional services such as writing your will, managing your estate, charitable trusts and financial planning.



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HOW ORGANISED ARE YOU?



HERE'S A CHECKLIST TO SEE HOW ORGANISED YOU REALLY ARE...

It's almost impossible to prepare for all the things life might throw at us. This checklist should help you consider what you have already got in hand and the things you might need to look at.

Just answer the following Yes/No questions.

Estate planning

Yes No N/A

- If something happened to me, my family would be looked after
- I have made an enduring power of attorney
- My Will is up-to-date
- I have an up-to-date nominated beneficiary for my superannuation
- I have nominated a guardian for my children

Financial planning

- I have a professional who helps me manage my investments
- My money is working as hard for me as it should be
- I earn more than I spend
- I have a professional adviser (e.g. financial planner) who helps me with my financial affairs

- Yes No N/A
- I know exactly what insurance cover my partner and I have
 - I have enough insurance and other money to cover my family's needs should something happen to me

Home and administrative help

- I am happy managing my own affairs
- I am able to remain in the family home with the domestic support I get
- I am able to manage and maintain the investment property
- I am happy with the home help I receive
- I am able to manage my own bookkeeping
- I have a plan in place if I'm no longer able to manage on my own

Planning for the unexpected

- I have a support plan in the event that I have a stroke or become incapacitated
- I would be able to look after a parent/spouse/dependent if something unexpected happened to them
- I know who will look after my affairs if I am no longer able to

Planning my retirement

Yes No N/A

- I have adequately planned for my retirement
- I am taking advantage of the super rules
- I know where all my superannuation is
- I know how much super I have in total

Charitable trusts

- I would like to set up a scholarship or charitable trust
- I would like to leave some money in trust to support organisations such as Alzheimers Australia

FOR A BETTER RESULT, GET THE SUPPORT YOU CAN TRUST

If you have answered 'no' to one or more questions, you might like to talk to Trust. We offer expert advice on estate planning, financial and retirement planning, charitable trusts and provide comprehensive administration services. We can also help with any questions you may have.

FOR A FRIENDLY CHAT, CALL US NOW ON 1800 622 812