Perpetual Private

Support for a better tomorrow

Personal injury services

Trust is earned.

Perpetual

For many years Perpetual has assisted people who have lost capacity, guiding them through the initial challenges and supporting them over time – ensuring their best interests are always at the centre of everything we do.

When you're supporting a client who has lost capacity, we'll work closely with you and your team to help manage the here and now and plan for the future.

Financial expertise with a personal approach

Choosing the right professional partner to support the careful and appropriate management of your client's funds can lay the groundwork for long-term financial security and enhance their quality of life.

Perpetual offers deep financial expertise, decades of experience, and consistent support—qualities that matter when you're looking after someone's future.

Our dedicated team takes the time to understand your client's unique circumstances and build a strong, trusted relationship with them and their support network.

Caring for your client's finances and wellbeing

As one of Australia's leading trustee companies, Perpetual is known for our financial expertise and individually tailored client service. Our investment philosophy seeks to protect capital while generating income to support your client's lifestyle and care needs.

Our in-house investment research team carefully selects investments that meet our strict quality standards and ensures they are right for our clients. We actively manage portfolios to respond to changing market conditions, drawing on our team's expertise in manager selection.

To achieve this, we diversify risk across asset classes, within asset classes, across countries and fund managers. We take a long-term approach to investing because we believe quality investments yield benefits in the long run.

How we can help you support your clients

With the best interests of vulnerable clients in mind we will work to develop a plan to meet their needs. We provide assistance with planning their ongoing financial needs whilst supporting their personal wellbeing.

Looking after **their lifestyle**

As trustee or financial manager, Perpetual works alongside your client's allied health professionals to help ensure their lifestyle goals are met and that all decisions are made with their wellbeing at the centre.

Looking after **their interests**

As trustee we act impartially and independently, always with the client's needs in mind.

Looking after **their finances**

As a professional trustee company, Perpetual has been managing the finances of Australians for over 130 years. We will look after their finances to ensure their money lasts as long as they need it to.

Looking after **their lifestyle**

We offer peace of mind through:

- Striving to help your client maintain the quality of life they deserve.
- Building a lasting relationship with them and their family throughout their journey.
- Providing a dedicated and highly experienced team that is responsive to their individual needs.
- Supporting the use of their funds for what matters most to them.
- Liaising with health professionals, private care agencies, care facilities, and government bodies on their behalf to ensure their needs are managed in a coordinated and thoughtful way.

Looking after **their finances**

We help you support your client by:

- Working to understand their short-term and long-term needs, to help ensure their money lasts as long as they need it to.
- Managing risk by investing and managing their assets appropriately.
- Advising on tax and superannuation to help them get the most out of their money.
- Assisting with budgeting and cash flow management.
- Paying regular household, medical, and care bills on their behalf.
- Whether we act as trustee or financial manager, providing advice and investment management services to help optimise their financial situation.

Looking after **their interests**

We look after your client's interests by:

- Helping ensure the longevity of their funds.
- Making sure their funds are spent with their best interests in mind.
- Managing trustee and financial management record keeping and reporting.
- Reporting to governing bodies as required.

"Life after the accident hasn't been easy. But having the Perpetual team on my side has been a monumental help. They do more than understand my situation – they support me through it."

Mary
Represented Person

Case study: Helping Mary

Mary, an 80-year-old woman, had lost capacity and had no children or immediate family. She had accumulated assets in her own name and inherited additional assets from her late husband, who had children from a previous marriage.

Mary's accountant was acting as her attorney. However, concerns were raised by interested parties regarding the management of her financial affairs. These concerns led to the matter being brought before the Victorian Civil and Administrative Tribunal (VCAT).

VCAT appointed Perpetual as Mary's Financial Administrator. This appointment provided reassurance to those worried about Mary's financial wellbeing, ensuring that her assets were managed responsibly and with her best interests in mind.

With Perpetual overseeing Mary's financial affairs, all parties involved gained peace of mind, knowing that her financial wellbeing was now in safe and capable hands. Perpetual's expertise and commitment to fiduciary responsibility ensured that Mary's assets were managed effectively, securing her financial future.

We're here to help

To find out how Perpetual can help, contact one of our specialised Senior Advisers:

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