



**PUBLIC TRUSTEE
AND GUARDIAN**

SUBMISSION OF MANAGERS ACCOUNTS TO PTG

The ACT Civil & Administrative Tribunal (ACAT) has appointed you as Manager for a person that ACAT has found to have impaired decision-making ability (called a protected person).

In your role as Manager, you have a number of obligations and responsibilities under the *Guardianship and Management of Property Act 1991* (the Act). In particular, under s. 26 of the Act you are required to file accounts and other documents relating to the management of the relevant property of the protected person on an annual basis to the Public Trustee and Guardian for the ACT (PTG) for examination.

Examination of these accounts will cover a twelve month period, the anniversary being the date of your appointment as Manager. ACAT will advise you by letter when the annual accounts are due.

Manager's Accounts filed with PTG should be in accordance with the regulations noted in the Act. A copy of the regulation can be found at – <http://www.legislation.act.gov.au/sl/1991-36/current/pdf/1991-36.pdf>

Upon filing the documents for examination by PTG each year, you will be required to pay the determined fee. This fee does not require

payment of GST and is discounted by 50%. The fee varies each year by CPI and the ACAT letter will advise you of the current fee.

You should note that the requirement to file the accounts and pay the fee is an obligation of the Manager and a failure to do so may result in a direction by ACAT and a penalty.

You should also note that s. 15 of the Act permits a Manager, who is entitled to reimbursement of such fees being reasonable expenses incurred by the Manager, to claim reimbursement of those fees from the person.

The documents to be provided are to cover the 12 month period and should identify -

- all income for the protected person including pensions, employment, superannuation, investments, rent;
- estimated value of assets; and
- statement of liabilities.

To assist in the examination, you should provide PTG with -

- *Payment of the filing fee on lodgement*
- *Statement of Property- Statutory Declaration – available from ACAT website*



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FACTSHEET

- Statements or transaction listings for all bank accounts held in the protected person's name for the **entire 12 month period**
- Statements of any shares or investments in the protected person's name
- Superannuation statements
- Receipts or explanation/statement for larger items of expenditure
- Expenses Summary/Budget- *optional but recommended*
- Payment of the determined fee for examination - payable by cheque -made out to the Public Trustee and Guardian; by EFT; or Eftpos at PTG.

If paying by EFT, please first contact PTG on 62079800 to obtain a reference number for the transaction.

The Public Trustee and Guardian is located at—

221 London Cct

CANBERRA CITY ACT

or by post to -

PO Box 221

CIVIC SQUARE ACT 2608

Should you wish to make any enquiries about your obligations in respect to the filing of these accounts, please contact ACAT on (02) 6207 1740.