



# PUBLIC TRUSTEE AND GUARDIAN

## DECLARATION BY SERVICE PROVIDER

### 1. PERSON/ORGANISATION

Full Name of person, business/firm or corporation	Full Postal Address
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### 2. NAMES OF PRINCIPALS OF BUSINESS/FIRM (if insufficient space please attach schedule)

Full Name/s	Full Postal Address/es and daytime contact phone number/s
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### 3. DESCRIPTION OF SERVICE PROVIDED

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### 4. ACN (if corporation)

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### 5. ABN

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### 6. STATEMENT BY SERVICE PROVIDER

As Service Provider/principal for the Service Provider, I declare the following -

- The applicant is in possession of a current professional industry/government registration or licence or alternatively appropriate qualifications, experience and skill in respect to the service provided.
- Neither I/the principal/s are disqualified from conducting the trade or profession in another state/territory.
- Neither I/the principal/s are subject to pending bankruptcy proceedings and are not an undischarged bankrupt/s.
- Neither I/the principal/s are the subject of current criminal charges/convictions or any unspent charges/convictions.
- The Service Provider has adequate public liability or other insurance as appropriate to protect the Public Trustee and Guardian (PTG) and its client.
- The Service Provider undertakes not to delegate any contracted work to another without PTG's prior approval.
- I do not have any relationship or association with any current member of the staff of PTG such as would give rise to a material conflict of interests.
- For legal practitioner providers - I am familiar with the [Law Officer \(Model Litigant\) Guidelines 2010](#).

### 7. SUPPORTING INFORMATION (to be attached to declaration)

- Current business testimonials/references.
- Current bank statement or bank reference.
- Current certificate of Insurance.

### 8. CODE OF CONDUCT

I acknowledge the following points and undertake to honour these in providing services to PTG-

- To conduct work in a manner that will maintain and strengthen public trust and confidence in PTG;
- To exhibit the highest standards of professional competence and private conduct and always maintain appropriate business and professional registrations, occupational licensing and insurances;

- To protect the dignity, privacy (in accordance with the requirements of the [Information Privacy Act 2014](#) (ACT)) and confidentiality of clients of PTG clients and disclose any limitations on their ability to guarantee full confidentiality;
- To refrain from advertising that they I/we act for PTG eg that the matter is in respect to a deceased estate;
- To ensure that competent and safe work practices based upon applicable standards, are adopted for all people dealing with PTG;
- To exercise judgement within my/our area of expertise and the limits of the qualifications of my/our staff;
- To carry out my/our duties efficiently and effectively;
- To fulfil my/our commitments in good faith and in a timely manner;
- To refrain from knowingly employing persons having unspent criminal convictions and, where necessary, undertaking to undergo any police checks;
- To act with honesty, integrity, and fairness and refrain from acting in a manner that would constitute a conflict of interest and declare to PTG any such potential conflict. (PTG will not agree to a request by an agent to bid or obtain a beneficial interest in property that they have been engaged to sell);
- To respect the rights and individual needs and choices of PTG's clients regardless of their race, creed, religion, sex, age, sexual orientation, national origin, or disability and ensure that services are delivered to the clients in a manner that is sensitive to cultural differences; and,
- To refrain from providing any gifts or gratuities to PTG staff in exchange for services or otherwise as our services are provided to our clients as trustee.
- Should any of the information declared above change, I will notify the Public Trustee and Guardian immediately.

I understand any report of dishonesty, fraud or malpractice involving dealings on behalf of PTG or its clients will be rigorously pursued by PTG and may result in removal from the Register of Service Providers. I recognise PTG, as part of this Code, will implement any necessary checks and balances to ensure that these expectations are respected.

#### 9. STATUTORY DECLARATION BY SERVICE PROVIDER

<p>I, ..... of ..... the person/principal named in this application, do solemnly and sincerely declare that to the best of my knowledge, information and belief, the information contained in this statement is true and correct.</p> <p>I make this solemn declaration by virtue of the <a href="#">Statutory Declarations Act 1959</a> (Clth) and subject to the penalties provided by that Act for the making of false statements in Statutory Declarations, conscientiously believing the statements contained in this declaration to be true in every particular.</p>	
<p>..... Signature of Person/Principal</p>	<p>Full name of witness</p> <p>.....</p> <p>Signature of witness</p> <p>Qualification of witness</p>

#### 10. DATE

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#### 11. SERVICE PROVIDER'S BANK ACCOUNT DETAILS (for use in payment of accounts)

Account Name			
BSB		Account No	

#### 12. OFFICE USE ONLY

Checked by		Advised Service Provider	
Entered in Register by/date		Advised PTG staff	



# PUBLIC TRUSTEE AND GUARDIAN

*Information Privacy Act 2014* (ACT)

## **Territory Privacy Principle 5 Notification of collection of personal information**

The Public Trustee and Guardian (PTG) is obliged to handle your information openly, transparently and in accordance with the Territory Privacy Principles set out in the *Information Privacy Act 2014*.

We explain how we collect, use, share and store your personal information and how you can access and correct it in our privacy policy. You may request a copy of our privacy policy or view it on our website at [www.publictrustee.act.gov.au](http://www.publictrustee.act.gov.au).

If you complete a PTG form, any personal information collected will be handled by PTG. This information is necessary in the administration of our responsibilities under ACT legislation.

The collection of personal information is required under the *Public Trustee and Guardian Act 1985*. We will not use or disclose this information for another purpose, without your consent, unless you would reasonably expect us to use it for a related purpose.

We only share information with other ACT Directorates/the AFP/ACT Ombudsman/Human Rights Commission or the Public Advocate of the ACT. We may however share your information with the Public Trustee and Guardian or equivalent in other Australian state/territories or to Commonwealth agencies, in order to assist you more efficiently.

If you believe that your personal information has not been handled appropriately or that we have breached the Territory Privacy Principles you may make a complaint to the Public Trustee and Guardian at -

Public Trustee and Guardian  
PO Box 221 Civic Square ACT 2608  
Email: [ptg@act.gov.au](mailto:ptg@act.gov.au)  
Phone: (02) 6207 9800

The ACT has a Memorandum of Understanding with the Australian Information Privacy Commissioner under which Privacy Commissioner services are accessed. If you feel that your complaint has not been appropriately responded to, you can make a complaint to the Commissioner.

You can contact the Commissioner at -

Office of the Information Privacy Commissioner  
Email: [enquiries@oaic.gov.au](mailto:enquiries@oaic.gov.au)  
Phone: 1300 363 992