



Helping clients reach their charitable goals is an integral part of our comprehensive range of trust services.

Whether you have a vision for your charitable giving or need assistance in developing one, FTL Estate Services can make it a reality.

We can assist you with:

- Setting up charitable foundations, creating gifting guidelines, gaining Tax Office approval for various tax concessions eligible for charities.
- The on-going administration of your charitable entity including the provision of accounting, secretarial and investment management services.

Flinders Charitable Trust

FTL Estate Services can offer you the opportunity to make donations to our own **Flinders Charitable Trust** which supports recognised charities at the State and national level.

We also offer you the opportunity to set up your own charitable trust under the umbrella of the Flinders Charitable Trust.

Should you wish to set up a private trust, we can also advise of various structures and again help with deeds and administration.

- **Executor assist and estate administration services**
- **Estate & succession planning - Wills, Family Trust deeds Testamentary Trusts, Enduring Powers of Attorney**
- **Business Succession planning and deeds**
- **Personal Trust and Trustee services**
- **Assistance to Attorneys**
- **Charitable trust services & the Flinders Charitable Foundation**

**A qualified legal practitioner prepares all facilitated Wills and other legal documents**

CONTACTS

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**National Executor Assist free call: 1800 623 530**

**FLINDERS TRUSTEES GROUP**



RECOMMENDED BY

FTL Estate Services

Estate Planning & Administration Consultants

Executor Trustee & Personal Services

for Deceased Estate, Personal Trust and Agency Services

## Duties of an Executor

The role of an executor can be complex, daunting and demanding. Some of these tasks include

- Interpreting the Will, relevant Legislation and Regulations;
- Determining beneficiary entitlements;
- Obtaining Probate, collecting and transferring assets;
- Preparing tax returns and identifying capital gains tax implications;
- Paying debts; keeping records; preparing financial statements.

**Would you like us to help you with these tasks?**

### Executor Assist

This is a premium service available to all private executors. If you are already an executor or you are looking after the affairs of someone who died without a Will, you can appoint FTL Estate Services as your agent to help you to complete your duties.

Executor Assist aims to reduce any risks to you of things going wrong and relieves you of what is often a series of very demanding and time consuming tasks. We use our skills and experience to get the job done for you in a timely and cost effective manner.

In addition to the above, FTL Estate Services can facilitate all legal, taxation, investment and property conveyancing for Estate Administration matters. Free of charge, we will identify the formalities required under the Will or on intestacy.

Where help is requested, we will provide you with a:

- Written no-obligation quote; and a
- Fixed price (payable out of the estate);

### Acting as an Executor

If you require an independent, impartial executor:

- Because your family situation or finances are complex;
- You want to establish some continuing trusts in your will;
- You do not have suitable local executors

Flinders Trustees can assist you with the appointment of an executor under your Will. Again we have the necessary skills to administer and distribute your estate in a timely and cost effective manner.

### Trust Administration

At FTL Estate Services we understand the role of trustee. We can help you with setting up and managing trust structures including family trusts, minor's trusts, compensation trusts and testamentary trusts.

Our aim is to help you as trustee protect your wealth, look after your family's best interests and as required, preserve assets for future generations.

We can be your appointed trustee subject to complying with legislation in your State

We use specialist lawyers and tax advisors to assess your particular needs and provide you with a quality Trust Deed. Our experienced administration staff can help ensure your trusts are properly managed on a day to day basis and any surplus funds are professionally invested.

### Family Office Services

FTL Estate Services is experienced at administering the day to day personal business affairs of an individual, couple or family. Our services can include accounting for assets, receiving income, and dividends, payment of expenses, regular remittances to private bank accounts and maintenance of investment and tax records.

This is a simple, straightforward and streamlined service that can be easily activated and de-activated at any time, as often as you like.

### Private Agency Services

FTL Estate Services can act as your agent under a power of attorney. This role allows us to manage your personal finances when you need our help for any reason. Control of your affairs remains with you and you can cancel the arrangement at any time.

You may use any of our range of administration services, including the receiving of income and payment of regular and ad-hoc bills.

Our Private Agency Service is popular with those persons who :

- require a hassle-free retirement
- lead a busy life
- are away for extended periods of time
- require assistance due to age or lack of mobility

and want to leave certain tasks in trusted hands.

### Assistance to Attorneys and Guardians

FTL Estate Services are able to assist **Attorneys** and **Guardians** to carry out their responsibilities.

We offer a bill paying service, collection of investment income & rent or other tailored services as required.

The service provides Attorneys and Guardians with impartial administration and full accounting is provided to assist with government reporting.