

## Specialist trustee services

At Australian Executor Trustees (AET), we have been providing professional trustee services to Australians since 1880. By working with trusted advisers, we help Australians grow, manage, protect and transfer their wealth.

Today, as part of the IOOF group, we have offices across Australia and offer a comprehensive range of specialist services through three core businesses:

- 1 Estate and trustee services
- 2 Superannuation
- 3 Corporate trust

### Estate and trustee services

By partnering with an individual's legal, tax and financial advisers, we offer an array of specialist estate and trustee services that can be tailored to suit the individual's needs and circumstances.

### Estate planning services

Our specialist estate planning services include:

- tailored estate plans
- execution of Wills and other estate planning documentation
- execution of powers of attorney for wealth protection.

### Trustee services

We provide tailored professional trustee services for families who require such services. Again, we partner with a client's trusted advisers to ensure their family wealth is managed effectively across generations. Some of the ways in which our professional trustee services help Australian families are through:

- charitable trusts and philanthropic services that allow an individual to create a personalised and everlasting giving program both during their lifetime and through their Will

- trustee services for the disabled that help families effectively structure their affairs to ensure that the disabled family member continues to be cared for once they have gone
- working closely with Aboriginal communities to provide trustee services to apply trusteeships and funds for charitable purposes
- financial management services for personal injury clients that help individuals manage their compensation payments effectively.

### Superannuation

As a specialist trustee company, we offers two self-managed super options for individuals who want the flexibility to take control of their own super fund and choose their own investments.

- The AET SMSF is for individuals who want to be trustee of their own super fund.
- The Private Super Fund is a small APRA fund solution that offers individuals the freedom and flexibility of investment choice, but without the burden of compliance because a professional trustee (AET) is appointed.

### Corporate trust

Our corporate trust division is a respected provider of corporate trustee services to the financial services industry, including custodian and security trustee services. Our main role is to:

- hold assets on behalf of clients
- hold security over assets
- act as a trustee for wholesale trusts.

To find out more about the wide range of trustee services we offer, please call **Shamal Dass** on **02 9028 1097**.