

# Personal Assist

The stress free way to manage financial and property matters



Public  
Trust

# Stay in control and leave the admin to us

Managing your financial and property matters by yourself can be challenging. Maybe your partner used to do it, and they're no longer here. Perhaps it's just becoming a bit much staying on top of everything. Or you need some impartial financial assistance to avoid family conflicts or relying on busy family members.

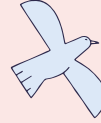
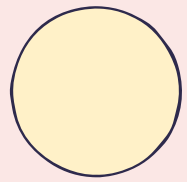
That's where Personal Assist can help. Our experts are on hand to do as much or as little as you need; giving you the peace of mind of being in control, without the stress.

To find out how Personal Assist can help you, contact us today.  
**0800 371 471**  
[info@publictrust.co.nz](mailto:info@publictrust.co.nz)  
[publictrust.co.nz/personal-assist](https://publictrust.co.nz/personal-assist)

# Helping you when you need it mo

Personal Assist is designed to give you the peace of mind that your financial and property matters are in order, even when you can't look after them yourself.





Manage your finances, without the worry. Personal Assist can protect you from financial abuse and allows you to remain independent, without needing to rely on family and friends

Caring for a loved one is time-consuming. Personal Assist frees you up to care for them, and not their financial affairs.

Your health, well-being and recovery take time and energy. Our dedicated experts can manage things when you're unable to.

Your time is precious. Personal Assist is perfect if you'd like to spend more time doing the things you enjoy and less time managing your affairs.



# We're at your service. Here's how we can help

When it comes to managing finances and property, we're here for you. From day to day banking, to investment management and property maintenance, we can help.

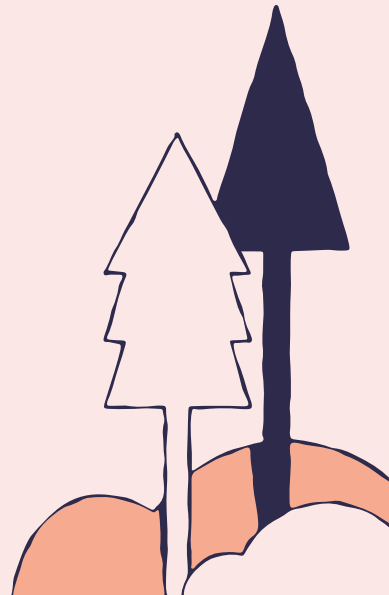
**You decide:**

**Short or long term help.**

Short term is great if you're heading away on holiday, or transitioning into a retirement village or rest home. Long term suits those who need ongoing assistance and peace of mind.

**Everything, or just a selection.**

You're in control. Maybe you just need help with your annual obligations, or you'd like us to manage everything. It's up to you.



## Some of the services you can choose from include:

### **Managing your Financial Matters**

#### **Daily Finances:**

Day-to-day banking, paying regular bills such as utilities, insurances and rest home fees, paying ad-hoc expenses like rest home or hospital accounts.

#### **Annual Finances and One-Off Transactions:**

Preparing income tax returns, managing gifting programs, selling assets such as a house, car and contents.

### **Pensions and Investments:**

Collecting pensions (here and overseas), superannuation, interest, dividends, benefits and other income.

**Claims:** Providing assistance for claiming all benefit entitlements, managing medical and other insurance claims.

#### **Financial Structure:**

Ensuring finances are structured to meet your needs and living costs, managing mortgages and loans.



### **Maintaining your Property**

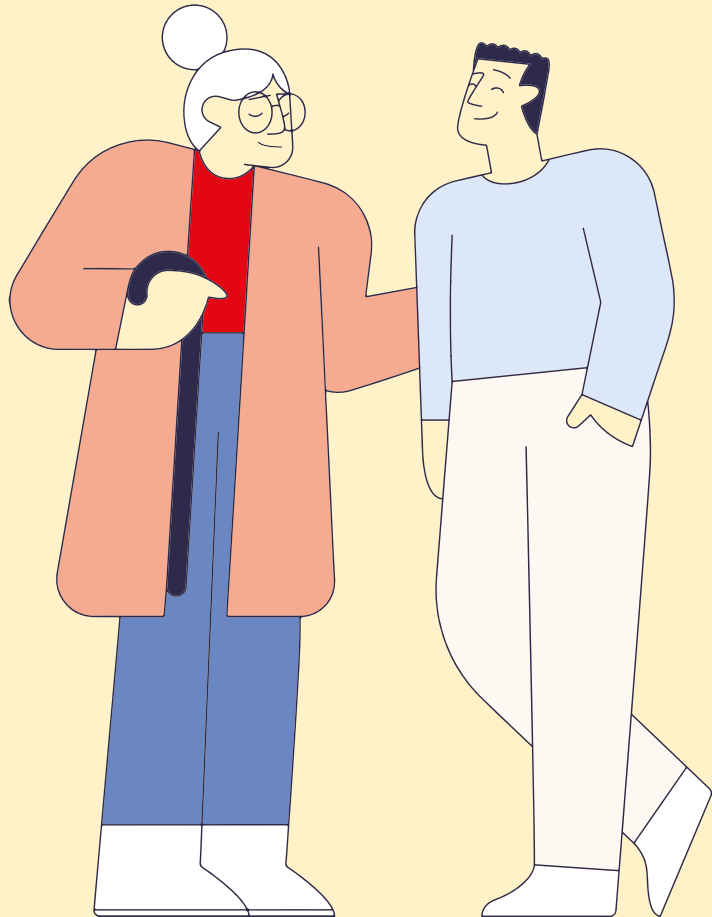
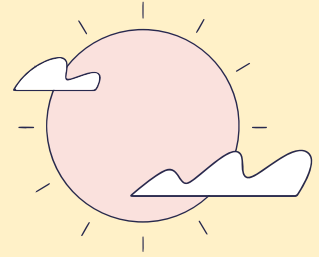
**Maintenance:** Managing regular and ad-hoc maintenance and repairs as required eg lawn mowing, tree trimming, window cleaning.

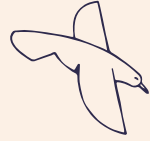
### **Home Sale Preparation:**

Overseeing the clearing out of possessions, organising cleaning and arranging home staging, liaising with Real Estate agents and other third parties.

### **Shifting to a Retirement Village or Rest Home**

**Transition Process:** Completing Rest Home agreements, applying for a Residential Care Subsidy or Loan, facilitating the purchase of a unit in a Retirement Village or co-ordinating the move into a Rest Home.





# Simple from start to finish



Everything we do is designed to make your life that little bit easier. Here's the process that we'll go through with you:

## 01

### Getting to know you

First, we set up an initial meeting to talk about your situation and how we can help. Come and have a chat, there's no obligation to take things further.

## 02

### Agreeing on what you need

Together we agree on what you would like us to take care of. We can provide a cost estimate for your specific needs before you make any decisions.

## 03

### Finalising the details

To enable us to help, you'll need to sign two documents:

- > An Enduring Power of Attorney, which gives Public Trust the authority to act on your behalf.
- > Your instructions to us, detailing what we have agreed.

## 04

### Getting on with things

A dedicated trustee will manage your work and coordinate any services needed, such as accountants, tax specialists and lawyers.

## 05

### Staying in touch

Your expert works for you, so they will be in touch, providing you with updates of the work they have completed.



# A fair rate you can rely on

As Personal Assist is tailored to your individual needs, the costs will depend on the services that you require. Talk to us about your needs, and we can provide you with a cost estimate before you make any decisions.



A complete range of service charges are available at [publictrust.co.nz](https://publictrust.co.nz) or any Public Trust Customer Centre.

# Trusted for generations

We have a proud history of looking after the interests of Kiwis. Here's why you can trust us with the things that matter to you:

We have over 150 years of experience, more than any other provider, so you know your expert has a wealth of experience behind them.

We're owned by the New Zealand government and have our own Public Trust Act (2001).

Over 250,000 Kiwis have already trusted us to help them, so you know you can too.



Find out more at  
[publictrust.co.nz](http://publictrust.co.nz)



**We're everywhere you are.**

**Got any questions about what you've read? We can chat online, on the phone, through our online customer centre or even in person, just like the good old days.**

