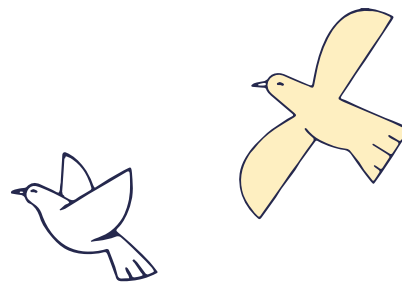


Personal Assist price list



Personal Assist is a unique one-to-one service where we can do as much or as little as you want to help you manage your financial and property affairs. You remain independent and in control, with the help of your own personal adviser to provide advice and support when you need it.

We can help with things like:

- > collecting mail and paying bills
- > completing tax returns
- > managing bank accounts and investments
- > organising household and garden services
- > arranging home repairs
- > helping people stay independent
- > choosing and moving to retirement homes
- > buying, selling or managing property

You only pay for the work we do

Once everything is set up, it can cost as little as a few dollars per month to manage ongoing bills. We can also provide other services such as collecting income, and organising repairs and service providers for you. This is charged at an hourly rate for the time it takes to do the work.

At your first meeting we'll discuss your situation and how we can help. There is no charge for this initial meeting. If you decide to go ahead, we will need to set out your wishes with a letter of instructions and prepare a property enduring power of attorney, appointing us as your property attorney. We can also provide other services such as applying for subsidies, arranging insurances, and organising repairs and service providers for you. This is charged at an hourly rate for the time it takes to do the work.

What will it cost?

Because Personal Assist is tailored to your needs, the set up and ongoing costs will depend on what you want us to do. There's no annual fee. Our charges are based on hourly rates that vary depending on the complexity of the work involved.

Standard charges	Fee (Incl. GST)
Preparing a property enduring power of attorney	\$358
Income handling fee – calculated on gross income collected	5% + GST if any
To prepare and file your tax return	hourly rates
Travel to visit customer fee (round trip)	\$62.00

Our hourly rates are priced from \$285.20 per hour for an Associate Trustee to \$499.10 per hour for a Senior Solicitor. The hourly rate that applies to a particular task depends on the expertise, experience, complexity of the work involved and the most effective and efficient management of the task. Our specialists will tell you their hourly rates and, if requested, will give you an idea of the fee for a specific task when they meet with you. If you would prefer that we come to you, we are happy to do so. The travel time will be at the hourly rate of the Trustee and the travel fee will apply for each round trip.

There may also be costs for disbursements such as: office costs, postage, photocopying, system maintenance, consumables & storage.

The fees and charges in this guide are inclusive of GST (except where stated otherwise) and are subject to change. Fees are stated as of 01 April 2024.

Please check with us to ensure the information is current. This guide is for information purposes only. Its content is intended to be of a general nature and does not take into account your individual circumstances. Please contact Public Trust or seek independent assistance if you want to find out how this information applies to you.