

Instructions for completing

A financial management plan for appointed administrators – *Guardianship and Administration Act 2000*

The Queensland Civil and Administrative Tribunal has appointed you as an administrator to make decisions regarding all or some financial matters for an adult who is unable to make decisions on these matters.

In order to protect the adult's interests, the tribunal requires information about the actions you have taken since your appointment and intend to take in the future to ensure the adult's income and assets are being used in their best interests.

How do I complete this form?

You may have supplied the tribunal with a financial management plan for proposed administrators when the application was made for your appointment; this plan gives the tribunal an indication of how you intend to manage the administration. However, it is common that a proposed administrator does not have full access or may not be aware of the adult's entire circumstances at this time. Therefore, the tribunal requires a further plan to see not only how you have progressed since your appointment as administrator, but also if any unforeseen circumstances have arisen that may require the tribunal's attention.

You can decide you do not need to use this format if you have a more complex arrangement or plan to present. Individuals, trustee companies and professionals can elect to submit a separate plan as an attachment to this form. However, if you do provide your own plan please ensure you supply information regarding the adult's circumstances based on the matters listed below:

What should a financial management plan include?

It should list, where known, all the adult's income and assets and show how they will be used to maximise the benefit to the adult.

A financial management plan should also cover the following matters:

- income and source of income
- details of the assets and where they are situated
- debts and when they are due
- bank account details
- any professionals needed to help manage the financial affairs, e.g., an accountant or solicitor
- budget, e.g. board and lodging, clothing, money for the person's personal needs, pharmaceutical needs, optical expenses, medical expenses, hospital fees, nursing home fees, dental expenses, taxes, gas, electricity, rates, holiday, insurance premiums, repairs and private health cover
- what will happen to the adult's house
- all income and expenditure records
- investments you need to make, and investments you need to keep track of
- any proposed gifts, e.g. birthday, Christmas presents

Instructions for completing *(continued)*

- money to be spent for maintenance of the adult's family
- legal matters relating to the adult's financial or property matters and how you propose to address these and
- any additional information relevant to the person's financial and legal affairs.

If you wish to add additional details of the person's financial matters, life circumstances and future considerations, please attach this information to the back of this form.

Where can I go for help with the financial management plan?

If you are uncertain about any steps in the procedure or you are doubtful about how to answer any of the questions, you should talk to staff at the QCAT registry or seek the advice of professionals such as accountants, solicitors or financial planners. There is also more information available on the QCAT website: www.qcat.qld.gov.au.

LODGEMENT DETAILS

Deliver to:	Mail to:	Fax to:	Email to:
Queensland Civil and Administrative Tribunal Floor 9, 259 Queen Street Brisbane Qld 4000 or at any local Magistrates Court	Queensland Civil and Administrative Tribunal GPO Box 1639 Brisbane Qld 4001	(07) 3221 9156	enquiries@qcat.qld.gov.au

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(Version 2)

For office use only	
Case number and type:	
Adult number:	
Date:	
Registry:	
Sent to:	

1. Basic information about the adult	
Tribunal client number	
<input type="text"/>	
Name	
<input type="text"/>	<input type="text"/>
<i>Title</i>	<i>Given name/s</i>
<input type="text"/>	<input type="text"/>
	<i>Surname/Family name</i>
How old is the adult?	<input type="text"/>
	<i>Years</i>
What is the adult's date of birth?	<input type="text"/> / <input type="text"/> / <input type="text"/>
	<i>Day Month Year</i>
What are the adult's current contact details? Give details for the place where the adult is now living or staying if this has changed since the tribunal hearing:	
Address	
<input type="text"/>	
<input type="text"/>	Postcode <input type="text"/>
Telephone	<input type="text"/> () <input type="text"/>
	<i>Daytime phone</i>
	<input type="text"/>
	<i>Mobile phone</i>
	<input type="text"/> () <input type="text"/>
	<i>After hours number (if different)</i>
Fax	<input type="text"/> () <input type="text"/>
Email	<input type="text"/>

5. How do you intend to continue to manage the administration?

5.1 Immediate plan:

What actions, if any, do you plan to undertake immediately for the adult?

For example:

- \$14,500 from bank account to be invested in fixed term deposit for six months at 4% to provide additional income for adult, or
- \$6,000 from proceeds of car sale is to be invested in bank cash management fund to provide additional income for adult

5.2 Future plan:

What long-term strategy will address the adult's needs, and is this plan now in place?

For example:

- proper accounts to be maintained
- accounts/bills to be paid regularly
- assets to be insured
- investments to be reviewed on a regular basis
- family members will visit regularly to check and advise of any unmet needs

7. Financial details

7.1 Income

Provide details of the adult's income

	\$ after tax per fortnight
Pension	
Mobility allowance	
Rent assistance	
Wages / salary (includes annuity)	
Investment income (includes share dividends – bank / term deposit interest)	
Rental income	
Any other income – list below	
Total income	

7.2 Expenditure

Provide details of the adult's expenses

	\$ after tax per fortnight
Accommodation	
nursing home fees / rent / board and lodging	
house and contents insurance	
home repairs and maintenance	
Utilities (includes power / gas / phone)	
Transport	
registration / insurance / maintenance	
petrol	
trains / bus fares / taxis, etc.	
other	
Personal	
meals / food	
medical (insurance / pharmacy costs, etc)	
alcohol / tobacco	
entertainment (including gambling)	
personal care (includes clothing and hairdresser costs)	

7.2 Expenditure (continued)

Provide details of the adult's expenses

	\$ after tax per fortnight
gifts birthdays & donations	
care / paid support expenses	
other	
Recreational	
holidays	
regular activities	
Other – list below	
Repayments (includes mortgage loans / credit cards)	
Total expenditure	

7.3 Budget summary

Total income per fortnight	Total expenses per fortnight	Income less expenses per fortnight
\$	\$	\$
<i>If the adult's expenses are greater than their income, what do you plan to do to make ends meet?</i>		

8. Details about the administrator completing this form

Name

<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Title</i>	<i>Given name/s</i>	<i>Surname/Family name</i>

Address

<input type="text"/>	<input type="text"/>
<input type="text"/>	Postcode <input type="text"/>

Telephone

<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Daytime phone</i>	<i>Mobile phone</i>	<i>After hours number (if different)</i>

Fax

Email

Privacy consent and disclosure statement

The Queensland Civil and Administrative Tribunal (QCAT) collects personal information from applicants in proceedings (You), for the purposes of compliance with the provisions of the *Queensland Civil and Administrative Tribunal Act 2009*.

Research purposes

QCAT wishes to use your personal information for research purposes to improve its services. An example of research is an online survey or focus group. QCAT may also share information about You with research companies for the purposes of conducting research. Any research company engaged by QCAT will undertake to keep your personal information confidential subject to the *Information Privacy Act 2009*.

By signing this Statement, you consent to communicate with QCAT by email or other suitable manner for research purposes; you consent to the sharing of your personal information with third parties as indicated and you waive your right to take further action against QCAT for any breach of your privacy.

Your consent commences from the date that you sign this Statement and return it to QCAT and continues for research purposes after your matter with QCAT has finalised and until you either withdraw your consent or upon the expiration of a period of 12 months.

Signature of applicant

By signing below, I acknowledge that I have read this Privacy Consent and Disclosure Statement and that I consent to the use and disclosure of my personal information as described in this Statement.

<input type="text"/>	<input type="text"/>
<i>Applicant/s sign here</i>	<i>Date</i>

Contact details

For further information call 1300 753 228 or write to the QCAT registry, GPO Box 1639, Brisbane 4001.

Warning

Section 216 of the *Queensland Civil and Administrative Tribunal Act 2009* makes it an offence for a person to knowingly give the registry documents containing false or misleading information.

Maximum penalty for such an offence – \$10,000.

SIGN AND DATE HERE

The information in this plan is true to the best of my knowledge.

Administrator sign here

Date