

21 March 2024

The Hon. John Quigley MLA  
Attorney General of Western Australia  
By email only: John.quigley@mp.wa.gov.au

Dear Attorney General,

**RE: Endorsement of the STEP Western Australia Submission on The Public Trustee**

We the Society of Trust & Estate Practitioners Australia Pty Limited (STEP Australia) represent professionals from across Australia who are specialists in trusts, estate planning and in supporting the needs of families (young and old, wealthy and modest). The objective of a STEP Professional is to advance the interests of families across generations. This often involves us in identifying issues of relative importance to families and bringing these to the attention of those who can make a positive difference. This is the purpose of this submission.

STEP Australia's membership includes lawyers, accountants, financial wealth advisors and trustee company professionals from across Australia; our members bring a multi-disciplinary approach to the benefit of their clients. It is this unique multi-disciplinary approach that supports this submission.

STEP Australia endorses the submission prepared by STEP Western Australia dated 4 March 2024 concerning the "The Public Trustee".

More detailed information is contained in the STEP Western Australia Submission attached.

If you would like to discuss any of the above, please contact myself, Ian Raspin TEP, STEP Australia Board Chair, on email [iraspin@bnrpartner.com.au](mailto:iraspin@bnrpartner.com.au).

Yours sincerely

Ian Raspin TEP  
**Chair of STEP Australia**

4 March 2024

The Hon. John Quigley MLA  
Attorney General of Western Australia

**By email only:** [john.quigley@mp.wa.gov.au](mailto:john.quigley@mp.wa.gov.au)

Dear Attorney General

### **The Public Trustee**

We write to you on behalf of the Policy Sub-Committee for the Society of Trust and Estate Practitioners of Western Australia (**STEP WA**).

As you may be aware, our membership largely comprises lawyers, accountants and financial advisors who practice in the area of estate planning. Many of them have regular interaction with the Public Trustee in the course of providing services.

In an ABC media report from May 2023, you were quoted as saying that the WA government would develop a revised fee model and independent governing board for the Public Trustee.

We are interested to know where those matters are at because we are continuing to receive reports from our members that clients remain concerned about having the Public Trustee involved in their estates and that clients are continuing to alter their estate planning to delete appointments of the Public Trustee.

To our knowledge, the Public Trustee has not yet engaged with the public in relation to last year's adverse media reports. It may be that the Public Trustee is waiting until the release of a second report into its operations by the Auditor-General (WA) that is, we understand, still to be released. The delay in engagement might also be due to the proposed revision of the Public Trustee's fee model and board structure.

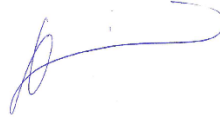
With it now being close to 12 months since the abovementioned ABC report, we were hopeful that the WA government might be close to announcing the changes to the Public Trustee's fee model and board structure. That announcement may allow the process of restoring the public's confidence in the Public Trustee to begin.

We would be most grateful if you could provide us with an update on these matters, or alternatively let us know if you would be willing to meet with us to discuss them further.

Yours sincerely

*D Bechelet*

Danielle Bechelet  
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STEP Western Australia  
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