



Australian Government
Department of Veterans' Affairs

Application for Appointment of a Trustee

A trustee is usually only appointed if the pensioner is so ill or infirm that he/she is incapable of managing his/her affairs. This application must be supported by two professional certificates. One of these certificates must be from a medical doctor.

A trustee has the legal right to retain and control a pensioner's pension or allowance.

Trustees are appointed under section 202(1) of the *Veterans' Entitlements Act 1986*.

In case pages of this form become separated, please place your name on top of each page.

Privacy notice

Your personal information is protected by law, including the *Privacy Act 1988*. Your personal information may be collected by the Department of Veterans' Affairs (DVA) for the delivery of government programs for war veterans, members of the Australian Defence Force, members of the Australian Federal Police and their dependants.

[Read more: How DVA manages personal information](#)

Giving false or misleading information is a serious offence.

If any of the details you give in this form change, you are required under section 54 of the *Veterans' Entitlements Act 1986*, to notify the Department within 14 days (28 days if you live overseas or receive Remote Area Allowance). There are penalties for failure to notify the Department.

In case pages of this form become separated please place your name on the top of each page.

For information, please call the Department of Veterans' Affairs (from anywhere in Australia) on:

1800 555 254

State	Address	Postal address
New South Wales	Centennial Plaza Tower B 280 Elizabeth Street Sydney NSW 2001	GPO Box 9998 Brisbane QLD 4001
Victoria	300 Latrobe Street Melbourne VIC 3000	GPO Box 9998 Brisbane QLD 4001
Queensland	480 Queen Street Brisbane QLD 4000	GPO Box 9998 Brisbane QLD 4001
South Australia	Blackburn House 199 Grenfell Street Adelaide SA 5000	GPO Box 9998 Brisbane QLD 4001
Western Australia	AMP Building 140 St Georges Terrace Perth WA 6000	GPO Box 9998 Brisbane QLD 4001
Tasmania	Barrack Place 254 - 286 Street Hobart TAS 7001	GPO Box 9998 Brisbane QLD 4001
Northern Territory	Winnellie Central 14 Winnellie Road Winnellie NT 0820	GPO Box 9998 Brisbane QLD 4001
Australian Capital Territory	6 Bowes Street Woden ACT 2606	GPO Box 9998 Brisbane QLD 4001

Please write in BLOCK LETTERS using a blue or black pen (not pencil).

Pensioner's details

1. DVA file number (if known)

2. Surname

3. Given name(s)

4. Date of birth

5. Residential address

6. Postal address (if same as residential, write "AS ABOVE").

7. Why is a trustee required?
(Note: Certificates in support of this statement must be sent with this application).

8. Is someone already acting on behalf of the pensioner?

No

Yes - please specify

Agent

Trustee

Power of Attorney

If someone has a power of attorney over the pensioner's affairs, please attach a copy of the appointment. This copy must be a certified copy (certified as true by a Justice of the Peace, a Commissioner for Declarations or another person before whom a statutory declaration may be made). If you provide the original document, the document will be sighted and verified by a DVA officer and returned to you by registered post.

Surname of person acting on behalf of the pensioner

Given name(s)

Address

Telephone numbers (include STD code)

Home []

Work []

9. Is anyone else authorised to make enquiries of DVA on behalf of the pensioner?

No

Yes - Surname

Given name(s)

Address

Telephone numbers (include STD code)

Home []

Work []

Your full name

Details of proposed trustee

If the proposed trustee is from an organisation, e.g. Public Trustee, please provide the name and contact details of the organisation's representative (i.e. the proposed trustee).

10. Name of proposed trustee

11. Contact name (if same as proposed trustee write "AS ABOVE")

12. Address

If the proposed trustee represents an organisation, please provide the organisation's address.

 Postcode

13. Postal address (if same as residential, write "AS ABOVE").

 Postcode

14. Telephone numbers (include STD code)

Mobile

Fax []

Work []

Other Type of number Number (e.g. home telephone number)



A proposed trustee will need to prove their identity to DVA by attaching certified copies of at least three different documents listed in *Proving Your Identity to DVA*, enclosed with this form.

If the proposed trustee is the representative of an organisation, such as a Public Trustee, proof of identity documentation is not required. However, in order to provide confirmation that you are the representative of the organisation, please provide the following after the Signatures section of this form:

- the organisation's ABN; and
- the organisation's official stamp.

Payment details

15. If you wish to have the pensioner's pension or allowance paid to a different account to where it is currently, please provide the following details:

Name of bank, credit union or building society

Branch

BSB number

 -

Account number

Account in the name(s) of

Your full name

Signatures

I am aware that as a trustee:

- I must manage the trust so that there is no conflict of interest between my own interests and those of the pensioner, i.e. I will not profit from the trust;
- I have a duty of care to manage the pensioner's pension or allowance for his or her benefit;
- I must keep accounts for the trust and produce them at the request of the pensioner or the Department of Veterans' Affairs;
- I must advise the Department in writing if the pensioner dies, marries, is divorced, or if there is any other change that may affect his/her pension or allowance;
- I cannot delegate any of the powers or responsibilities of the trust to another person;
- I must keep trust money in a separate account from my own money;
- I am familiar with the law that covers the administration of trusts in my State;
- I must prove my identity to DVA before I can be appointed as a trustee; or
- I must provide the ABN and official stamp of the organisation I represent before I can be appointed as a trustee.

I understand that if I am appointed trustee, I will be sent details of the terms of the trusteeship. This will list my obligations in more detail.

Proposed trustee's signature

Date

Organisational Representative

If the proposed trustee is an organisational representative, such as a Public Trustee, please provide the following:

Organisation's ABN

Organisation's official stamp

A pensioner may elect to have a friend or relative, or an ex-service organisation (or its representative) act on his or her behalf in relation to this application. If so, this Authority must be completed by that person.

I declare that I am authorised by

to act on his or her behalf in matters relating to this application.

Your full name

Address

Postcode

Telephone numbers
(include STD code)

Home []

Work []

Signature

Date

Your full name

OFFICE USE ONLY

Approval by Delegate of the Repatriation Commission under s. 202(1) of the *Veterans' Entitlements Act 1986*

Signature of Delegate of Commission

Terms of Trust (Form D2707) sent