



**PUBLIC TRUSTEE
AND GUARDIAN**

FILING OF ACCOUNTS WITH THE PUBLIC TRUSTEE AND GUARDIAN BY MANAGER FOR A PROTECTED PERSON

The ACT Civil & Administrative Tribunal (ACAT) has appointed you as Manager for a person that ACAT has found to have impaired decision-making ability (called a protected person).

In your role as Manager, you have a number of obligations and responsibilities under the Guardianship and Management of Property Act 1991 (the Act). In particular, under s. 26 of the Act you are required to file accounts and other documents relating to the management of the relevant property of the protected person to the Public Trustee and Guardian for the ACT on an annual basis (PTG) for examination.

Examination of these accounts will cover a twelve-month period and are due within 28 days of the anniversary of your appointment. PTG will advise you by letter when the annual accounts are due.

Manager's Accounts filed with PTG should be in accordance with the regulation made under the Act. A copy of the regulation can be found at –

<http://www.legislation.act.gov.au/sl/1991-36/current/pdf/1991-36.pdf>

Upon filing the documents for examination by PTG each year, you will be required to pay the determined fee. This fee does not require payment of GST. The fee varies each year in accordance with anticipated increases in the Consumer Price Index (CPI) and our reminder letter will advise you of the current fee.

You should note that the requirement to file the accounts and pay the fee is an obligation of the Manager and a failure to do so will result in referral to ACAT for their consideration and possible direction or penalty.

You should also note that s. 15 of the Act permits a Manager, who is entitled to reimbursement of such fees being reasonable expenses incurred by the Manager, to claim reimbursement of those fees from the person.

The documents to be provided are to cover the 12 month period and should include -

Public Trustee and Guardian

Fact Sheet – SUBMISSION OF EXTERNAL ACCOUNTS v1

Ground Floor
221 London Circuit
Canberra City ACT 2601

PO Box 221
Civic Square ACT 2608

Tel (02) 6207 9800
Fax (02) 6207 9811

Email ptg@act.gov.au
Web www.ptg.act.gov.au



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FACTSHEET

- all income for the protected person including pensions, employment, superannuation, investments & rent;
- estimated value of assets; and
- statement of liabilities.

To assist us in the examination, you should provide PTG with -

- Statement of Property- Statutory Declaration – available from ACAT website
- Copies of statements for all bank accounts held in the protected person's name for the entire 12 month period of examination
- Evidence of assets and liabilities declared in the statement of property (share dividends, superannuation statements etc)
- Copies of receipts or an explanation or statement for larger items of expenditure over \$2000
- Receipts or explanation/statement for larger items of expenditure
- Income & Expenses Summary/Budget (per fortnight or month) - optional but recommended

- Payment of the determined fee for examination – by EFT (pls contact

PTG for a reference beforehand); or EFTPOS or by cash to PTG. (If paying by EFT, please first ring to obtain a reference number for the transaction).

PTG is located at -

221 London Circuit
CANBERRA CITY ACT

Our postal address is -

PO Box 221
CIVIC SQUARE ACT 2608

Or email to -

ptgext@act.gov.au (pls insert the GT number in the subject line).

Please do not provide your documents on a disk.

Should you wish to make any enquiries about your obligations in respect to the filing of these accounts, please contact ACAT on (02) 62071740.