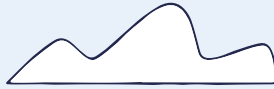
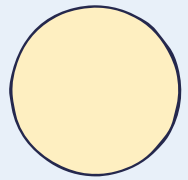


Personal Assist

The stress free way to manage financial and property matters.



Public
Trust



Stay in control - let us handle the details



Managing financial and property matters can feel overwhelming. Our Personal Assist service gives you expert support so you stay independent and stress-free.

Life changes and sometimes managing everything on your own becomes challenging. Whether your partner used to handle things, you want to avoid relying on family members, or you simply need a little extra help, Personal Assist is here for you.

Our experts can take care of as much or as little as you need – protecting you from financial abuse, reducing stress, and freeing up your time for what matters most.

With Personal Assist, your affairs stay in order, and you stay in control.

To find out how Personal Assist
can help you, contact us today.

0800 371 471

info@publictrust.co.nz

publictrust.co.nz/personal-assist

We're at your service. Here's how we can help

From to day-to-day banking to property maintenance to claiming benefits or support you're entitled to, we can help.

Short or long term help

Short term is great if you're heading away on holiday, or transitioning into a retirement village or rest home.

Long term suits those who need ongoing assistance and peace of mind.

Everything, or just a selection

You're in control. Maybe you just want help with your annual obligations, or maybe you need us to manage everything. It's up to you.

Select the services that work for you

Our experts act on your instructions to make sure your wishes are met.



Managing your financial matters

Daily finances:

Day-to-day banking, paying regular bills such as utilities, insurances and rest home fees, or ad-hoc expenses like medical accounts.

Annual finances and one-off transactions:

Preparing income tax returns, managing gifting programs, or selling assets such as a house, car and contents.

Pensions and investments:

Collecting pensions (here and overseas), superannuation, interest, dividends, benefits and other income.

Claims:

Providing assistance for claiming all benefit entitlements, managing medical and other insurance claims.

Financial structure:

Ensuring you have enough funds to meet your needs and living costs, including managing mortgages and loans.

Maintaining your property

Maintenance:

Managing regular and ad-hoc maintenance and repairs as required like, lawn mowing, tree trimming or window cleaning.

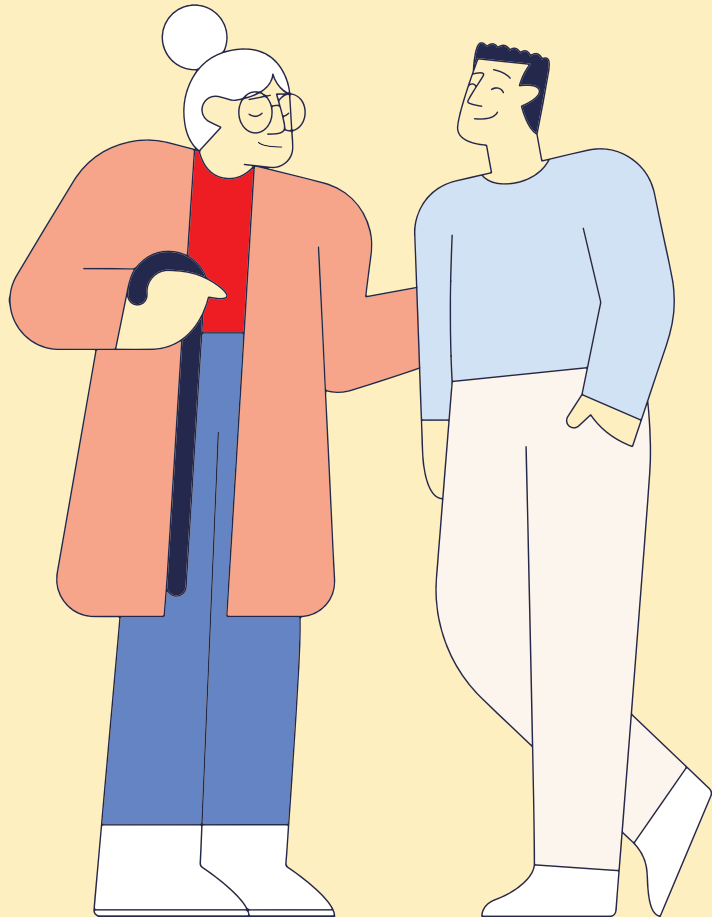
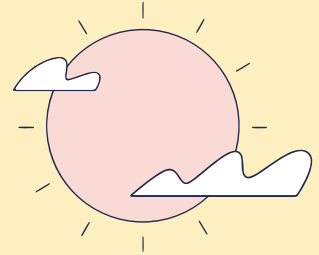
Home sale preparation:

De-cluttering and overseeing the transfer or storage of your possessions, organising cleaning and arranging home staging, liaising with real estate agents and other third parties.

Shifting to a retirement village or rest home

Transition process:

Completing rest home agreements, applying for a residential care subsidy or loan, facilitating the purchase of a unit in a retirement village or coordinating the move into a rest home.





Simple from start to finish



Everything we do is designed to make your life that little easier. Here's how we'll work with you – step by step.

01

Getting to know you

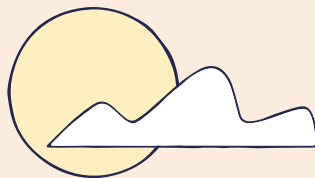
First, we set up an initial meeting to talk about your situation and how we can help. Come and have a chat, there's no obligation to take things further.

02

Agreeing on what you need

Together we'll agree on what you would like us to take care of based on your specific situation, and we can talk through potential costs before you make any decisions.





03

Finalising the details

To enable us to help, you'll need to sign two documents:

- > An enduring power of attorney, which gives Public Trust the authority to act on your behalf.
- > Your instructions to us, detailing what we have agreed.

04

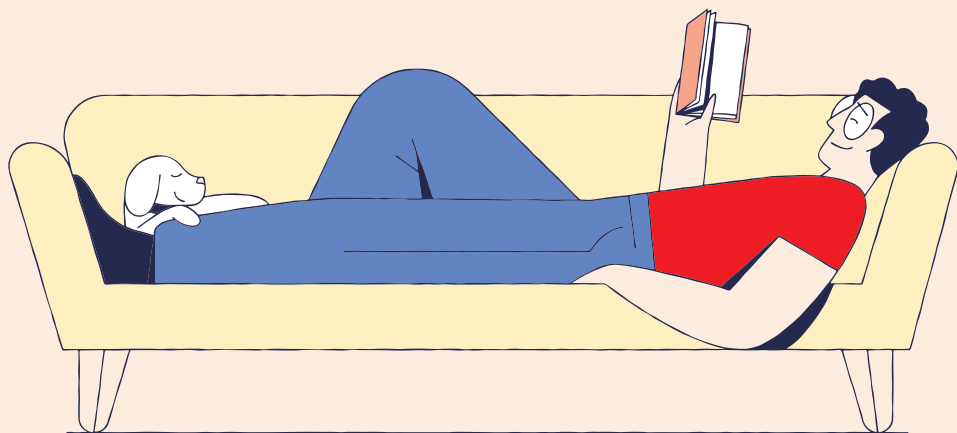
Getting on with things

A dedicated trustee will manage your work and coordinate any services needed, such as accountants, tax specialists or lawyers.

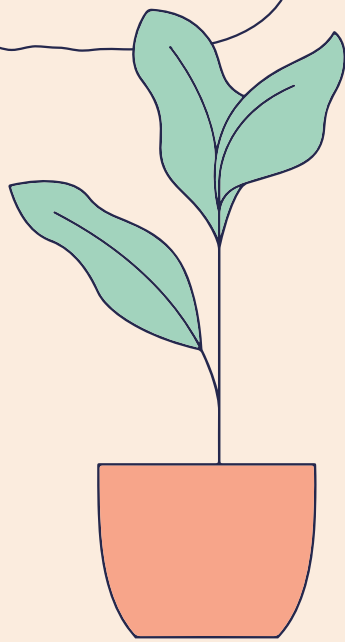
05

Staying in touch

Your expert works for you, so they will be in touch, providing you with updates of the work they have completed.



Notes



A fair rate you can rely on

As Personal Assist is tailored to your individual needs, the costs will depend on the services you require.



Talk to us about your needs and we'll talk through potential costs before you make any decisions.

A complete range of service charges are available at **publictrust.co.nz** or any Public Trust Customer Centre.

Trusted for generations

Since 1873, we've been here to protect what matters most to Kiwi — their future, their wishes, and their peace of mind.

For over 150 years, Public Trust has stood alongside New Zealanders, helping them navigate life's important decisions with confidence and care.

As a Crown entity, we're guided by legislation including the Public Trust Act 2001 and the Administration Act 1969 — ensuring everything we do is grounded in integrity, transparency, and proper process.

Generations have relied on us to safeguard their financial and legal affairs, and we're proud to continue that legacy today. Whether you're planning ahead or need support now, you can trust us to be here, just as we always have been.



Find out more at
publictrust.co.nz



**Got questions about what
you've read?**

**We have the expertise and
experience to help you – with
convenient options to get
you sorted online, in-person
or over the phone.**

