

Public Trust

Entry last updated on 17 December 2024

Commonly used abbreviated name

PT

Relevant legislation

- Public Trust Act 2001
- Crown Entities Act 2004
- Howard Estate Act 1978

Organisation type

Statutory Crown entity – autonomous Crown entity

Organisation outline

Governance and Management

Public Trust is governed by a Board of between five and nine members appointed by the Responsible Minister. The Board is required to supervise or direct the management of the affairs of Public Trust.

The Chief Executive of Public Trust is appointed by the Board and may not be a member of the Board. The Chief Executive is responsible to the Board for the efficient and effective management of the affairs of Public Trust.

Operational Structure

There are three major areas of the operational structure of Public Trust:

Retail, Investments & Fee Protect

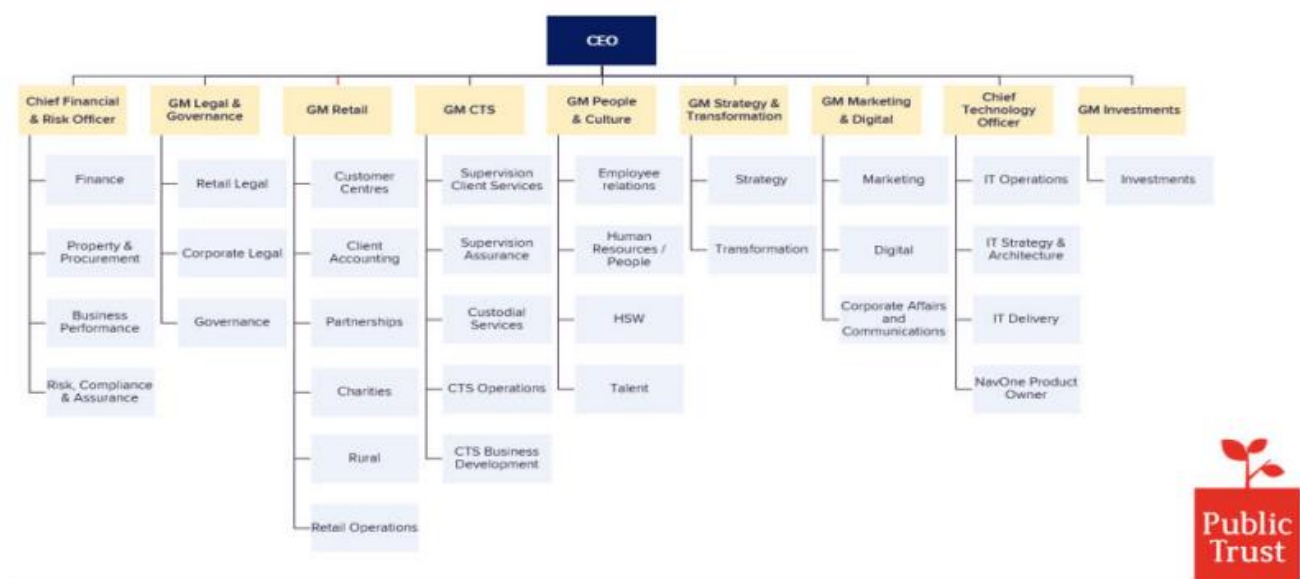
This area is responsible for Public Trust's activities relating to its individual, Fee Protect, Charitable Trust and farm customers. Retail comprises a number of teams across New Zealand located at 22 Customer Centres, including three corporate sites and five appointment sites.

Corporate Trustee Services

This area is responsible for Public Trust's activities relating to its supervisory and corporate trustee functions with teams based in Wellington and Auckland.

Corporate Office

This area provides a range of support services to Retail and Corporate Trustee Services, such as accounting and tax support, information services, legal and governance advice, funds management, marketing and communications, and human resources.



Senior Leaders and their respective responsibilities

- Glenys Talivai, Chief Executive Officer is charged with the day to day management of Public Trust overall.
- Brad Edley - Chief Financial and Risk Officer oversees Public Trust's financial strategy, planning, and operations
- Chris East - Chief Information Officer - oversees Public Trust's technology strategy, ensuring that IT systems and initiatives align with business goals, enhance efficiency, and support innovation.
- David Callanan - General Manager Corporate Trustee Services - day to day management of Corporate Trustee Services
- Amanda Livingstone - General Manager of Investments - day to day management of Public Trust Investments Service
- Vanessa Dudley - General Manager Retail Customers - day to day management of the Retail arm of Public Trust
- Lyndsey Francis - General Manager Marketing and Digital - day to day management of Marketing and Communications at Public Trust
- Andrew Bhimy – Chief Strategy and Transformation Officer – oversees Public Trust's overall strategy and transformation
- Brad St Clair - General Manager Legal and Governance - manages Public Trust's legal affairs and oversees governance practices.
- Leona Cheffins - General Manager People and Culture - drives HR strategy and workplace culture.

Organisation responsibilities

- Wills
- Enduring Powers of Attorney
- Personal Assist
- PPPR
- Family and Inheritance Trusts
- Charitable Trusts
- Corporate Trustee Services
- Executor Assist
- Estates
- Fee Protect
- Tax

Advisory groups, boards, committees, trusts and statutory officers

The Board

Sub-committees:

- Risk Assurance Committee
- Audit and Finance Committee
- People and Culture Committee
- Board Secretary
- Privacy Office

Organisation data records

Retail, Investments & Fee Protect and Corporate Trustee Services

Documents relating to Retail, Investments & Fee Protect and Corporate Trustee Services customers are kept in a mixture of hardcopy file relating to that customer and/or the central electronic document management system. Progress is underway to transition more files to a purely electronic document management system.

Documents kept in these files include:

- correspondence;
- governing documents, such as the Will or Trust Deed and minutes of meetings;
- decision sheets;
- court documents (if any);
- financial and tax information; and
- information relating to the estate's assets.

Corporate Office

Documents relating to the Corporate Office are kept in a central document management system and in hardcopy files where necessary.

Such documents include:

- human resources records;
- accounting and tax information and records;
- commercial documents such as contracts;
- policies and procedures; and
- corporate governance documents

Organisation description – policies/guidelines/manuals

<https://www.publictrust.co.nz/search/>

<https://www.publictrust.co.nz/financial-reports-and-statements/>

Corporate publications

<https://www.publictrust.co.nz/make-an-official-information-request/>

<https://www.publictrust.co.nz/terms-and-conditions/>

<https://www.publictrust.co.nz/privacy-policy/>

<https://www.publictrust.co.nz/financial-reports-and-statements/>

Public Trust internal policies include:

Privacy Policy, OIA Requests & Complaints Policy, Leave Policy, Parental Leave Policy Flexible Working Policy, Employee Gifts and Functions Policy, Disciplinary and Performance Management Policy, EEO Diversity Policy Code of Conduct, Protected Disclosures Policy, Internal Audit Policy, ESG Policy, Corporate Governance Framework, Investment Management Policy, HSW Policy and CTS Supervision Policy.

Required records or documents

Privacy Policy: <https://www.publictrust.co.nz/privacy-policy/>

Public Records Act 2005:

<https://www.legislation.govt.nz/act/public/2005/0040/latest/DLM345529.html>

Statutory outputs

Public Trust is a statutory corporation and Crown entity. Its principal functions as set out in the PT Act are to:

- Develop, promote, conduct or otherwise participate in the business of providing comprehensive estate management and administration services, including associated legal, financial, and other services; and
- Carry out, perform, or otherwise fulfil functions conferred on Public Trust by the PT Act or

any other Act; and

- Carry out, perform, or otherwise fulfil other functions requested by the Minister responsible for Public Trust acting in agreement with the Minister of Finance (together, referred to as the Responsible Minister), and agreed to by Public Trust; and
- Develop, promote, conduct, or otherwise participate in such other business as Public Trust determines with the approval of the Responsible Minister.

Frequently requested information

Corporate Information including:

- Internal reports or advice provided to decision-makers.
- Information about how specific policies were developed.
- Details about how PT operates (e.g., guidelines, manuals, internal policies).
- Budget allocation and spending details.
- Costs of specific projects or activities.
- Audit reports or financial statements.
- Copies of contracts with service providers.
- Tendering and procurement processes.
- Annual reports or performance reviews.
- KPI outcomes or evaluations of programs.
- Emails or letters between agencies or with external parties.
- Communications relating to specific topics or decisions.

Guidance on transferring requests

If Public Trust does not hold the requested information, we will transfer the request to the appropriate agency within 10 working days.

OIA Exemptions

Official Information within the meaning of the Official Information Act 1982 does not include information held by Public Trust in its capacity as a trustee or in any other fiduciary capacity. When acting as a trustee or in any other fiduciary capacity, Public Trust therefore cannot be required to disclose under the provisions of the Official Information Act any information relating to an estate, including personal information held about a person or the reasons for making decisions in such capacity.

Data sharing

Public Trust collaborates with the Ministry of Justice on sharing PPPR orders volumes through an information sharing agreement.

Contact

Privacy@publictrust.co.nz

0800 371 471

<https://www.publictrust.co.nz/make-an-official-information-request/>



MINISTRY OF
JUSTICE
Tāhū o te Ture

New Zealand Government