



FUNDS IN COURT NEWSLETTER

SUPREME COURT
VICTORIA



To give a better understanding of the Senior Master's Office

AUGUST 2008

IN THIS ISSUE:

- Fond Farewells
- Who's Who—Trust Officers
- Dani & Sally—the Voices of the SMO
- Corporate Governance Booklet
- Your Questions

Did you know?

The Senior Master was appointed to his position 25 years ago.

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Michael Karabogias
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Fond Farewells

By Graeme Morris
Principal Trust Officer

July saw the departure of three valued members of the SMO. It was somewhat of a surprise considering that in the past 16 years there have been only about three resignations each in the Trust and Client Liaison areas.

The first departure is due to the retirement of Trish Blundell, the Principal Client Liaison Officer. Trish joined the SMO in March 1994, coming from a background in trust administration, and working with people with disabilities. Although somewhat different to her previous role, she soon adapted and developed in her new position.

In her career with the SMO she treated all people with respect and enjoyed her time visiting clients and

achieving results for them. She maintained a network of contacts who could assist beneficiaries when needed. Trish also developed and trained a dedicated, enthusiastic team of Client Liaison Officers. That team is now ably led by Lee Archer who worked with Trish as part of the CLO team for 5 years.

Trish also maintained close relationships with colleagues. Her opinions were often sought and always ensured that any decisions made were in the best interests of beneficiaries.

Staff and beneficiaries alike were appreciative of her experience, her expertise and her friendship. All her colleagues at the SMO extend their thanks and wish her well in her

retirement.

As for our other two departees, Trust Officers Michael Nazaretian and Fadil Osman were at this office for 6 and 16 years respectively. Michael and Fadil have completed financial planning courses recently and have taken the opportunity to further their careers with their new qualifications.

Both will continue to be active in the trust administration field, although they are going to separate entities.

Michael and Fadil have been valuable members of the trust team and will be difficult to replace. All at the SMO extend very best wishes to both officers in their new careers.

Who's Who— Trust Officers

By Michael Nazaretian

"The Trust Section represents the core values of the SMO – integrity, professionalism and respect for others."

When you want to discuss your funds in Court or need some extra spending money, who do you call? When you think it's time to buy or sell a house or a car, or need help in dealing with TAC or Centrelink, who do you call?

You guessed it. You call your **Trust Officer!**

A Trust Officer [TO] is allocated upon funds being paid into Court for a beneficiary. The TO is responsible for the day-to-day administration of the funds and is, therefore, a beneficiary's or his or her family's **first and ongoing point of contact** with the SMO.

The Trust Section represents the core values of the SMO – integrity, professionalism and respect for others. The Trust Section, consisting of 12 TOs, has a collective **experience of over 230 years** in trust administration and assisting people with a disability! The vast experience of each Officer gives the Trust Section the ability to

empathize with the many social, lifestyle, legal and financial issues of a beneficiary and the needs of his or her family.

Trust Officers each look after the funds for, on average, over 400 beneficiaries and **dedication** is important in managing this workload. TOs are dedicated to maximizing quality of life for each beneficiary and are **sensitive** to his or her needs. Therefore, when a beneficiary has a proposal or request, the TO will discuss the proposal, which may involve asking further questions or arranging a meeting, and then submit a memorandum or Court Order to the Senior Master for his consideration.

TOs pride themselves in delivering **personal service** to each beneficiary. When you call the Office, there is **no call centre**; calls are forwarded directly to

your allocated TO. This ensures you always receive **personal contact** with your TO.

TOs are committed to, and regularly attend, professional development and internal training courses to keep abreast of issues that beneficiaries may face such as Acquired Brain Injury courses, Centrelink and Transport Accident Commission seminars, courses for insurance and real estate procedures and legislation.

Although TOs come from diverse cultural backgrounds and ages, one thing they have in common is that they love their work and are passionate about helping people with disabilities.

If you have **any questions** about your funds held in Court or wish to discuss a request, just call and have a chat to your Trust Officer.

New E-mail Address

The SMO has a new email address for all your comments and suggestions for the Newsletter:

smobag@supremecourt.vic.gov.au

Dani & Sally – the voices of the SMO

By Michael Karabogias

In these days of automated call centres, it seems we spend more time pressing buttons than speaking to actual people.

However, when you ring the SMO you will never need to follow the impersonal prompts of some mechanical voice.

Instead, you will hear the friendly voices of Dani or Sally .

Dani is the SMO's main telephone receptionist. Sally is our front desk receptionist who also greets people when they visit the office.



Dani Zivkovic

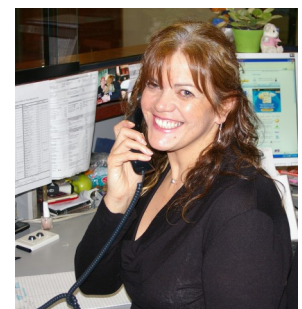
Dani and Sally have worked at the SMO for many years, so they are familiar with the needs of many beneficiaries. Not only do they know which Trust Officer is allocated to which beneficiary but will often also be aware of the background to a particular request, thereby saving

beneficiaries and their families from the need to provide a detailed explanation of the reason for their call.

Of course, they also have access to the SMO's computer system—TMS—so are able instantly to provide you with information about such matters as whether your maintenance has been paid into your bank account or cheques have been posted.

So, it was thought you would like to put faces to the friendly voices which

greet you when you phone the SMO. And, yes, those smiles are genuine; they are the smiles those who work at the SMO are fortunate enough to see every day!



Sally Pacione

Did you know?

The Funds in Court Newsletter is available on the Supreme Court's Website.

New SMO Information Booklet- Corporate Governance

The SMO has produced a new information booklet outlining its corporate governance structure.

Corporate governance is concerned with the way in which the SMO is controlled and directed, and describes the corresponding systems and practices in place to ensure that:

1. The interests of beneficiaries are protected.
2. Financial and other risks to the funds are minimised.
3. The Senior Master, Management and Staff assisting him are accountable to the beneficiaries and other key stakeholders.

The booklet, as well as other SMO pamphlets and the *SMO Information Booklet* are available by calling the Office on 9603-9390 or on the Web in the Funds in Court area of the Supreme Court's website: www.supremecourt.vic.gov.au



Your Questions

Why does it take so long to get money I have requested?

The Rules of Court provide that money held for a beneficiary by the Senior Master cannot be paid out except by order of the Court. Such orders are usually made by the Senior Master.

Therefore, once a request has been made to your Trust Officer, and all the required information provided, it is necessary to prepare an order which is then considered by the Senior Master. If the Senior Master agrees with the request he will make the order by signing and stamping it.

When the Senior Master makes the order, the order is scanned (so that it is available electronically for later reference) and returned to the Trust Officer to enter the payment into the SMO's computer system.

The payment must then be approved by both a senior Trust Officer and a senior Legal Officer. The payment is then sent either

electronically or by cheque. This stage is also subject to approval by a senior Trust Officer and a senior Legal Officer.

The reason for the different levels of approval is to ensure that all payments made from your funds are paid from the correct account and to the appropriate person.

The Senior Master and his staff are always vigilant to ensure that your funds in Court are protected and cannot be accessed by unauthorised persons or used for inappropriate purposes.

Although the process may seem cumbersome and time-consuming, over 82% of payments to or on behalf of beneficiaries are processed

within 5 days of receipt of request.

Of course, in a real emergency, funds can be made available much sooner.

Send us your questions

Do you have any questions about the functions of, or services provided by, the Senior Master's Office? Send them to us and we will do our best to answer them. Please send your questions to:

Funds in Court Newsletter
c/ Senior Master's (Funds in Court) Office
210 William Street,
Melbourne, VIC, 3000

or email to:
smobag@supremecourt.vic.gov.au

In the next edition: A CLO's Excellent Adventure!

We need your suggestions

The Funds in Court Newsletter welcomes your suggestions. What kind of information would you like to see in future editions? Do you have a story you would like to share? Is there an Office procedure you would like explained. Whatever it is, send your suggestion or contribution to:

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