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Introducing our Client Charter

Funds in Court is proud to present its brand new Client Charter. It explains what you can expect from Funds in Court and what we ask of you. It also describes the way that we want to work with you.

The Client Charter was developed by talking with:

- clients from our Client Consultation Group
- members of our Funds in Court team
- other experts from our Service Advisory Committee.

We kept the Client Charter short and simple because our clients wanted it like this. We also focused on topics that are important to our clients.

You can keep this newsletter copy of the Client Charter for your records. You can also find it on our website on our Publications > Information Sheets page (fundsincourt.vic.gov.au/publications/information-sheets/client-charter) or ask us to send you a copy via email or post.

We hope that you find the Client Charter helpful.

If you have any questions or comments about the Client Charter, please contact Nigel Jarvis at Funds in Court by:

- calling 1300 039 390
- emailing feedback@fundsincourt.vic.gov.au.

Funds in Court Client Charter



Introduction

Funds in Court is an office of the Supreme Court of Victoria. We manage money that has been awarded by courts or other authorities to people with a legal disability, including children.

This Client Charter was developed by talking with clients, our Funds in Court team, and other experts. It explains what you can expect from Funds in Court and what we ask of you.

What you can expect from us

We are committed to delivering high quality services that are respectful, safe and responsive. At Funds in Court, you have the right to expect the following.

Our approach

We will treat you with:

- courtesy, dignity and humanity
- respect, regardless of your views, age, race, colour, culture, religion, gender, sexual preference, family situation, personal background and/or disability
- honesty and integrity
- open-mindedness and fairness
- sensitivity and compassion.

Our communication

Our communication will be:

- clear and consistent
- open and transparent
- accurate and timely
- easy to find and access
- adapted to suit your needs.

Listening to you

We are committed to:

- seeking your views about the use of your funds in Court
- helping you to “have your say” about decisions that affect you
- supporting the use of advocates, when required
- seeking your views, feedback and suggestions about our services
- putting your goals and preferences at the centre of our service to you.

How we work and respond to you

We are committed to:

- offering you a professional service that is aligned with relevant disability laws and standards
- helping you to access our services by providing you with relevant information
- responding to incoming communication within reasonable timeframes
- simplifying our processes where we can
- making sure that we have the skills and training to do our jobs well.

Funds in Court acknowledges and pays respect to the Traditional Owners and Custodians of the land from which it provides services to clients, including the peoples of the Eastern Kulin Nation who are the Traditional Owners of the land on which Funds in Court's office is located.

Safe services

We are committed to:

- providing services that are free from abuse, harm, violence, exploitation, discrimination, harassment and neglect
- providing culturally safe and inclusive services for our diverse range of clients
- protecting your information and only using it for the right reasons
- managing your funds responsibly.

Working with your supports

While we only manage your funds in Court, we will try to:

- work with your personal and professional supports, if required
- play our part with your supports to help you build on your strengths, reach your goals, and participate in society
- help you access other professional support services, if requested.

Concerns

We welcome all feedback, complaints and appeals. You can tell us about any concerns you have by phone, email, letter, via our website or in person.

We are committed to:

- making sure you can tell us about your concerns without fear of negative consequences
- responding to complaints within timeframes that are set by Standards Australia
- acknowledging mistakes and taking action to make things right
- providing you with information on how to take a complaint further if you are not satisfied.

What we ask you to do

You can help us provide you with high quality services by:

Your communication

- providing accurate information about your circumstances
- updating your contact details when changes occur
- letting us know if you need help with communication
- asking us questions if you do not understand something.

Your views

- giving us feedback on the things we do well and the things you have concerns about
- making suggestions about how we could improve how we work
- completing our satisfaction surveys.

Safety

- treating us, other clients and visitors with courtesy and respect at all times
- letting us know about any safety issues that may affect us during visits.

By working together in this way, we aim to give you the best possible service. This does not mean that we will never make mistakes. But it does mean that we are committed to following these principles as we work with you.

Phillip's story

Phillip is one of those people who endears himself to everyone that he meets and inspires us all to make lemonade from life's lemons.

Phillip was hit by a car as a seven-year-old pedestrian and sustained severe injuries. His funds were paid into Court when he was 14.

During his adolescence and early adulthood, he had to overcome teasing, bullying and harassment in multiple settings, but he always eventually managed to find a way of dealing with these challenges.

Phillip has explored a wide variety of courses and jobs.

At one of his first meetings with Funds in Court, he described himself as a “drug peddler.” In fact, his description was quite accurate, as he was actually employed by the local pharmacy to deliver prescription medications to elderly customers on his bike!



Phillip is thrilled with his new home where he now lives with his wife and daughter

Phillip became the score board operator for the local football club in 2008 as he is “quick with maths”, a position he enjoys to this day.

Phillip did Year 11 and 12 at TAFE, where he completed Certificates in hairdressing, make-up and floristry. He then went on to complete a Certificate III in floristry after TAFE followed by a Certificate IV in Liberal Arts at Swinburne TAFE.

Phillip's story (continued)

Phillip is rarely without work, and his employment history includes call centre work, sales and reception duties, delivery logistics, packaging, forklift driving, and a voluntary role as a late-night DJ!

Phillip's sense of humour seems to be a family trait. When he told his great-aunt about his planned wedding date, she joked, "Do you expect me to live that long?!" Phillip and his now-wife changed their plans and eloped, and had a small beach ceremony a month later. However, when the priest realised the beach where they had their second ceremony wasn't sanctified they had another ceremony, meaning they have been married three times – and yes, his great-aunt is still alive!

His zest for life also extends to his pastimes, which have included the preparation of fermented foods and driving his Fiat sportscar! However, now that Phillip is happily married with a five-year-old daughter, he describes his main hobby as "enjoying getting five minutes to sit on the couch in peace!"

His daughter's arrival sharpened Phillip's focus on buying a family home, but he struggled to find something that suited his family's needs while also meeting Funds in Court's quality standards and leaving him with enough funds in Court to address future expenses.

While he was initially resistant to undergoing a neuropsychological assessment for payment out, Phillip eventually agreed that this would help him to achieve his goals. Unsurprisingly, he was deemed to have financial capacity and was able to have all his funds paid out to him.

Phillip was "over the moon" at the news and asked if he could be paid out with a large novelty cheque – and when he spoke to us for this article he joked "And I'm still waiting!"

Phillip was paid out all of his funds in late 2025. Excitingly, he and his wife have bought a family home and they are all settling in well.

Phillip had been a key member of our Client Consultation Group. We are thankful for the insightful and articulate feedback that he has provided over the last couple of years. His contributions have helped us improve our services for all clients.

Those of us at Funds in Court who knew Phillip will certainly miss him and his infectious enthusiasm for life!

Tax time reminders

We have sent you your trust tax statement for the financial year ending 30 June 2026. This contains details of income that need to be included in your individual tax return.

What are franking credits?

Franking credits are a form of tax credit that are attached to dividends. Franking credits can be used to offset your tax. If you have funds invested in Common Fund No. 3, you will have franking credits.

If the value of the franking credits is higher than the tax, you may have 'excess franking credits' and be able to claim a refund. You can see if you have excess franking credits by checking your trust tax statement.

Tax time reminders (continued)

How can you claim excess franking credits?

You may need to lodge your individual tax return to claim your excess franking credits.

You can lodge your individual tax return yourself or engage a tax agent to help you.

If you do not have any other income outside of your funds held in Court, we can help you claim the excess franking credits from the Australian Taxation Office. This service is free of charge. Contact your Client Services Officer for more information.

Where can you get more information?

We have more information about excess franking credits at fundsincourt.vic.gov.au/for-clients/excess-franking-credits.

If you have any questions, please contact your Client Services Officer or the Accounting and Taxation team by calling 1300 039 390 or emailing requests@fundsincourt.vic.gov.au.

Farewell Evan

Evan started work at Funds in Court in 1983 and is retiring after 43 years of looking after client accounts and investments. He has seen an incredible amount of change during his time at Funds in Court, but he says one thing has stayed the same – how dedicated everyone is to doing their best for our clients.

When Evan started there were only four other people in the office. John McInerney had the title of Senior Master's Clerk and Evan was known as a Master's Clerk.

Client accounts were maintained on coloured ledger cards.

MASTER OF THE SUPREME COURT COMMON FUND No. 2						Page No.	
Date	Name	Details or Direction	Chq/Rec. No.	Withdrawal	Deposit	Balance	
	Brought forward						
23-7-79	By Corporate Affairs	payment in			855 53	855	53
1 JUN 1980	INTEREST				72 72	928	25
1 JUN 1981	INTEREST				102 08	1030	33

Blue ledger cards were used for Common Fund No. 2 accounts

Evan says, "We banked with the State Bank of Victoria so we would walk up to the bank each day. The bank was on Swanston Street. You can see clients received interest on the first of June each year, just like they do today. It would take two to three weeks to record each client's interest payment on the ledger cards." Thankfully Funds in Court has long since upgraded to computerised systems that can calculate and deposit every client's income from their funds in a fraction of the time!

Evan remembers the office installing its first computer in 1991, which kept a record of deposits and withdrawals a lot like a cash book. Initially this was only used by the Senior Master's Clerk but computers were soon given to all staff members.

Farewell Evan (continued)



Evan with the 2016 AFL Premiership Cup won by his beloved Western Bulldogs

The investment team saw a sharp increase in their workload in 1992 when client funds were first invested in shares.

“In those days each client had individual holdings – that was a nightmare!

We got to about 545 individual accounts that we needed to maintain. Each account held 18 shares which all paid dividends every six months, meaning we were recording 36 payments per year for each client. If we multiply that by 545 that was over 19,600 entries.

Thankfully in 2004 Common Fund No. 3 came on board which made it much, much easier. These days we hit a few buttons, and it is all done.”

Alongside his day-to-day work, Evan has lent his expertise to the Funds in Court Investment Compliance Committee and Investment Review Panel.

He has also been a generous donor to our fundraising efforts for charity, often winning office raffles.

Evan says, “It has been a great pleasure to work at Funds in Court. I have met and come into contact with so many people along my

journey and feel very privileged to have worked with everyone past and present. Everybody puts the clients first and does as much as they can to assist them.”

Ben Moorfield, Director Investment Services, was Evan’s manager for nearly 17 years. He says, “Evan is part of Funds in Court’s foundation. His 43 years of dedicated service speak for themselves.

I am incredibly grateful for his unwavering loyalty, exceptional contribution, and the consistent support he provided throughout the years. Evan was someone I could always rely on and, just as importantly, a valued friend. His presence and impact will be greatly missed.”

We wish you all the best with your retirement Evan, and we hope you enjoy no longer having to get out of bed at 5.30am!

Join our Parents and Carers Consultation Group

Funds in Court is creating a new consultation group that we would like people to join.

We want to get more input and feedback from parents and carers about the services we provide. This is really important because parents and carers are often the main contact for our clients. Parents and carers can also help us understand what is important to clients who cannot tell us themselves.

Who can join?

We are inviting people who are our clients' main representatives to join this group. This could include parents, grandparents, partners, siblings, adult children, and other members of a client's extended family or care network.

We also want to have parents and carers who represent different groups of clients, such as clients of different ages, newer clients as well as those who are more familiar with Funds in Court, and clients with different levels of independence and activity.

What will this group do?

We will ask for the group's feedback on improvements we are planning for our client services. We also want to hear about things that members find frustrating and explore their suggestions.

The meetings will be less formal than some of our other groups, so members feel more comfortable expressing themselves.

When will the meetings happen?

The group will meet for approximately one hour every three months at a time that works for most members.

Where will the meetings happen?

The meetings will be held online, so more people from more places can participate.

How can you join?

If you are interested in joining or have any questions, please contact Nigel Jarvis, Community Liaison Advisor, by emailing feedback@fundsincourt.vic.gov.au.

Join our client feedback group

We want to get regular feedback from clients about our services and improvement plans. To do this, we have created the Client Consultation Group. This group meets regularly to discuss these topics.

If you are interested in finding out more about this group, please contact our Community Liaison Advisor, Nigel Jarvis. You can email Nigel at feedback@fundsincourt.vic.gov.au or call him on 1300 039 390.

Leaving money to a Funds in Court client in your will

Some relatives and friends of Funds in Court clients have asked us if they can leave money in their will to the client they care about. This can be done.

What do you need to put in your will?

You need to record an express wish in your will to your executor or trustee. This express wish needs to say that you want to pay a share of your estate to the Senior Master of the Supreme Court of Victoria for the benefit of the Funds in Court client you know.

What will happen to the money?

The executor or trustee of your will shall pay the money you have left to your relative or friend to the Senior Master. This payment is made under the *Trustee Act 1958* (Vic).

Once the money has been paid into Court, it is held according to the rules and orders of the Court. The money is not held under any other terms. This means no other documents, like your will, can restrict how the money is used.

The money will be held in the name of the Senior Master for the benefit of your relative or friend.

The money will be put into Common Fund No. 2.

How can you help the payment go smoothly?

There are two things you can do to help the payment go smoothly.

1. Include your express wish about willing a share of your estate to the Senior Master of the Supreme Court of Victoria for the benefit of your relative or friend in your will.
2. Give a certified copy of your will to someone you trust. This could be your solicitor or the person who will be the executor or trustee of your will.

Can the funds be paid out to your relative or friend?

As with other funds held by Funds in Court for the client, funds that have been paid into Court under the *Trustee Act* can only be paid out by an order of the Court.



More information

If you have any questions about this, please call 1300 039 390 (+61 1300 039 390 from outside Australia) or email requests@fundsincourt.vic.gov.au with 'Attention: Solicitor to the Senior Master' in the subject line.

Learn how to stay safe from scams

The CyberAbility Project designs cyber safety resources for people with a brain injury. The project works with people with living experience of brain injury and scams, Monash University researchers and disability services.

You can access their free Learn How to Stay Scam Safe training on their website at cyberability.org.au/free-training. The training covers:

- What is a Scam?
- Scam and Brain Injury
- What are Red Flags?
- Romance Scams
- Gaining Access Scams
- Tips for Increasing CyberAbility
- Stopping a Scam
- Finding the Silver Lining.

National Redress Scheme applications close 30 June 2027

The National Redress Scheme is available to people who experienced child sexual abuse while in an institution. Applications to the National Redress Scheme close on 30 June 2027.

Successful applicants may receive redress in the form of:

- a payment
- access to counselling and psychological care, and
- a direct personal response from a participating institution.

Free and confidential support services are available to help people understand the Scheme, consider their options and, if they choose, complete an application.

Independent legal assistance and financial counselling are also available. People should get independent legal advice to understand their options before deciding whether to accept any offer of redress.

The National Redress Scheme website, nationalredress.gov.au, explains:

- who is eligible
- what support is available
- what institutions are participating
- how to apply.

Join us at Embrace 2027

Embrace



We invite you to attend Embrace 2027. It will take place in the first half of 2027. Join us to celebrate the clients who are showcasing their talents by displaying artwork or performing a song, dance or poetry reading on stage.

If you want to attend or have any questions, please call us on 1300 039 390 or email requests@fundsincourt.vic.gov.au.

About Embrace

A key goal of Funds in Court is to enhance the lives of our clients. This is not confined to managing day-to-day requests. It is also about celebrating the people, their capabilities and their accomplishments.

After witnessing the wide range of artistic talent in our community, Funds in Court staff found a way to showcase our clients' talents. And so, after much preparation, hard work and dedication, 'Four Seasons in One Day' was introduced.



Gurrenah displayed his artwork 'Perfection' at Embrace in 2025. This is an art style he has been developing for two years



Jim with his three paintings at Embrace in 2025, 'The Tiger in Me', 'Smiles and Laughter at Physiotherapy' and 'My Sister Alex'

Join us at Embrace 2027 (continued)

This art show and concert took place in 2010. It featured 25 artworks and performances by five clients. 'Four Seasons in One Day' was renamed 'Embrace' in 2012.

Since then, Embrace has run every two years, the only break being 2020 due to Covid restrictions. The event grew in popularity with more and more clients wanting to participate and attend the evening.

Our most recent event took place in March 2025. Forty-four participants displayed their diverse perspectives and personal stories through their artwork or performance.

Together with close to 250 attendees, we celebrated the incredible achievements of artists who have faced and overcome challenges, transforming their experiences into stunning works of art.

This event is a testament to the ability of art to connect us, build empathy, and foster greater understanding. We take great pride in supporting the creativity of our clients and providing a forum to showcase their talents.



Juanita displayed her artwork 'Koori Colours', which features the Koori flag, turtles, snakes, lizards and sticks at Embrace 2025

Join us in 2027

We invite all clients to attend Embrace and join us to celebrate the clients who are showcasing their talents by displaying artwork or performing a song, dance or poetry reading on stage.

You can watch videos and read about past Embrace events on our website on the Embrace page at fundsincourt.vic.gov.au/for-clients/embrace.

If you want to attend or have any questions, please call us on 1300 039 390 or email requests@fundsincourt.vic.gov.au.

Funds in Court (FIC) acknowledges the people of the Kulin Nation as the Traditional Custodians of the land and waterways upon which this newsletter was produced.

FIC acknowledges and pays respects to ancestors of this country, Elders, knowledge holders and leaders – past and present. FIC extends that respect to all Aboriginal and Torres Strait Islander peoples.