



# **PUBLIC TRUSTEE AND GUARDIAN**

## **POLICY**

<b>DOCUMENT PROPERTIES</b>	
Name of Policy	<b>Wills Week - Seniors Week Arrangements</b>
PTG Policy Number	2017-14
Version/s	30.11.2016
Endorsed by SLG	30.11.2016
Authorised by	Andrew Taylor, Public Trustee and Guardian
Date for review (plus three years)	30.11.2019

### **LEGISLATION**

Not applicable.

It is however expected that the Public Trustee and Guardian (PTG) undertake programs to increase public awareness of the importance of having an up-to-date Will and Enduring Power of Attorney (EPA).

### **POLICY**

PTG policy is to hold two major public promotional campaigns each year as follows -

- Seniors Week - March each year (Incorp Life's Reflections)
- Wills Week - October each year

#### **Seniors Week**

ACT Seniors Week is a Council on the Ageing ACT (COTA ACT) initiative supported by the ACT Government. It aims to showcase Seniors' issues and provides an ideal opportunity for PTG to both raise public awareness of the importance of having an up to date Will and EPA as well as PTG's Guardianship and Financial Management Services.

There is opportunity during Seniors Week for PTG to have a stall at the Seniors Expo and also to hold two free public seminars, one during the day and one in the evening and preferably one on the Southside and one on the Northside.

#### **Life's Reflections**

Life's Reflections is a community photographic competition that seeks photographic images which celebrate the unique and valuable contribution that older people make to our community. It is a competition which encourages people of all ages and walks of life to take a creative approach to their photography and to generate positive, diverse and thought-provoking images of older people.

The ACT Office for Veterans and Seniors Affairs (CSD Directorate) collects information from the Entry Form for the purposes of conducting the competition and exhibition and awarding prizes; promoting Life's Reflections Photographic Competition; promoting future initiatives, programs or competitions by the ACT Government relating to positive ageing, healthy and active lifestyles, the importance of inter-generational relationships and Canberra: Age-Friendly City.

PTG sponsors Life's Reflections for \$4,000 (plus GST) each year and also provides a judge. PTG is able to use any of the photos submitted in its marketing campaigns, typically in posters promoting its Seniors Week/Wills Week activities.

### **Wills Week**

Most Australian Public Trustees celebrate Wills Week at different times throughout the year. The ACT Law Society also holds its own Will Week.

PTG seeks to celebrate Wills Week as a means of raising community awareness and education about the importance of having an up to date Will and EPA, in the form of two free public seminars, one during the day and one in the evening and preferably one on the Southside and one on the Northside.

## **PLANNING FOR SENIORS WEEK AND WILLS WEEK**

### **Date**

The date for Seniors Week is determined by COTA ACT and PTG will be advised well in advance (5 months) by COTA, generally held in the third week of March.

The date for Wills Week is determined by PTG usually mid/late October.

### **Events**

#### Seniors Week

PTG will book a stall at the Seniors Week Expo for the days provided.

PTG will independently hold two free public seminars, one during the day and one in the evening and preferably one on the Southside and one on the Northside.

#### Wills Week

PTG will hold two free public seminars, one during the day and one in the evening and preferably one on the Southside and one on the Northside.

### Marketing

Marketing should be undertaken as broadly as possible including the following -

- Newspaper advertisements - prepare an advertisement through PTG's graphic designer Erica Bossell and seek quotes for placement in The Canberra Times and The Chronicle. Placement of ads should ensure two ads in each paper in the week prior to the events. Check also City News and Canberra Weekly free papers/magazines. COTA ACT will also ask PTG to place an ad in its own Seniors Week lift-out.
- Poster - A poster should be prepared through PTG's graphic designer. We should aim to use the images from the "Make it Happen - Make a Will" campaign. An example is at Attachment A.
- Email the flyer by updating all staff email signature blocks before the event...change back after.
- Seminar flyer - This is in the form of a PTG Compliment slip prepared as at Attachment B. These can be placed on PTG's Reception Counters and anywhere else.
- Email to Community Organisations including Seniors Clubs/Organisations, Licensed clubs, Community Groups, NGOs, Probus etc etc. There is an online resource at - [http://www.communityservices.act.gov.au/wac/ageing/ACT\\_Seniors\\_Directory/support\\_services](http://www.communityservices.act.gov.au/wac/ageing/ACT_Seniors_Directory/support_services)  
[https://www.accesscanberra.act.gov.au/app/answers/detail/a\\_id/960/~/-/contact---act-community-directory](https://www.accesscanberra.act.gov.au/app/answers/detail/a_id/960/~/-/contact---act-community-directory)  
<https://vc-act.mycommunitydirectory.com.au/>
- Whole of ACT Government notice - send an email to Leo Clarke at ACT Publishing Services seeking the placement of a free WHOG Notice...usually the poster will suffice.
- Radio - Community radio ads are usually free. Contact JACS Communications Unit to see whether they can organise for us in the week before the event. Suggest Radio announcements and Community Switchboard.
- All adds to state "Bookings essential".
- In the weeks leading up to Wills Week in October and Seniors Week in March, ask Reception staff to us the Wills/Seniors Week promo message promoting the event.
- Place ad in ACT Veterans Seniors Newsletter at [communityparticipation@act.gov.au](mailto:communityparticipation@act.gov.au)

- Request that the whole of Government desktop background include a copy of the poster.
- Request inclusion on club (venue) newsletters and also as a poster on noticeboards or on Reception counter.

#### Formats

Depending upon the nature of the event, PTG may hold either a seminar or a forum in which several speakers may talk with allotted time at the end for questions and with a break in the middle for tea/coffee/biscuits.

Seminar - This format involves several speakers making presentations about EPAs, Wills and other e.g. Guardianship/Management with allotted time at the end for questions and with a break in the middle for tea/coffee/biscuits.

Forum - This format involves several short 10-15 minute presentations about Wills, EPAs and other e.g. Guardianship/Management and a panel of PTG experts. These presentations are followed by a moderator who will have set questions to get the audience going and encourages questions from the audience to the panel.

#### PowerPoint

PTG has prepared PowerPoint presentations for use during seminars. The benefit of PowerPoints is that it avoids a 'talking head' and the audience may wish to take notes. It is also a useful prompt for speakers.

#### 'Showbags'

These are PTG presentation folders with the PTG logo on the front prepared by Reception staff and containing Fact Sheets, Going Public Newsletters, Power to Choose booklet and any other promo material eg pens, pads etc.

#### Venue requirements

- One Northside and one Southside presentation, one morning and one evening.
- Seating for potentially 120-130 people
- Parking (preferably free)
- Accessibility re buses
- PTG will usually request the venue to provide a discount on the venue hire (Attachment C).
- Laptop, litepro, screen, several cordless roving microphones, tea/coffee and biscuits, event signage (depending upon event format)
- Organiser to confirm numbers several days ahead with venue.

#### Prizes

PTG will provide prizes to be drawn at the end of the event.

A ticket is given to each attendee as they arrive.

Possible prizes are flowers, book shop vouchers, movie passes etc.

#### Free Wills

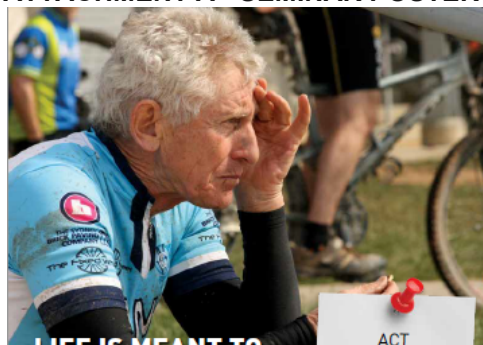
PTG has a policy of providing free Wills to all persons of 65 years and over. Persons under 65 years attending will be provided with a Complimentary Will Voucher.

#### **CHECKLIST**

A checklist is provided at Attachment D.

#### **END OF POLICY**

## ATTACHMENT A - SEMINAR POSTER EXAMPLES



**LIFE IS MEANT TO BE LIVED...**

ACT  
*Wills Week*  
14 - 18  
October

but there are times when we have to catch up on life's housekeeping.

During ACT Wills Week we're making it easier for you to get your affairs in order. Attend one of our free seminars on the importance of having an up-to-date Will and Enduring Power of Attorney.

<b>Wednesday</b> <b>16th October 2013</b> Ainslie Football Club 52 Wakefield Avenue, Ainslie <b>Time: 9:30am - 12:00pm</b> Morning Tea Provided	<b>Thursday</b> <b>17th October 2013</b> Hellenic Club Matilda Street, Woden <b>Time: 6:00pm - 8:00pm</b>
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Lucky Door Prizes. Free will voucher for all women attendees and attendees 60 years of age and over.

Places limited, Bookings Essential, call **6207 9800**

**PTACT**  
PUBLIC TRUSTEE  
FOR THE AUSTRALIAN CAPITAL TERRITORY



**LIFE IS MEANT TO BE LIVED...**

ACT  
*Wills Week*  
22 - 26  
October

but there are times when we have to catch up on life's housekeeping.

During ACT Wills Week we're making it easier for you to get your affairs in order. Attend one of our free seminars on the importance of having an up-to-date Will and Enduring Power of Attorney.

<b>Tuesday 23th October 2012</b> Ainslie Football Club 52 Wakefield Avenue Ainslie <b>Time: 9:30am - 12:00pm</b> Morning Tea Provided Lucky Door Prizes Places limited, Bookings Essential, call <b>6207 9800</b>	<b>Friday 26th October 2012</b> Aegean Room, Hellenic Club Matilda Street Woden Town Centre
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221 London Circuit, Canberra City, ACT, (02) 6207 9800  
Visit our website at [www.publictrustee.act.gov.au](http://www.publictrustee.act.gov.au) for information on our services.  
[publictrustee@act.gov.au](mailto:publictrustee@act.gov.au)

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PUBLIC TRUSTEE  
FOR THE AUSTRALIAN CAPITAL TERRITORY

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## ATTACHMENT B - SEMINAR FLYER



### ACT Senior's Week

#### **FREE SEMINAR** on the importance of having:

- an up-to-date Will
- an Enduring Power of Attorney

- Time – 9.00am – 12 noon
- Tuesday 20 March 2012
- Lakeside Marquee, Canberra Southern Cross Yacht Club, Lotus Bay, Mariner Pl, Yarralumla
- Morning tea provided
- Bookings necessary – call 62079800

Visit our website at [www.publictrustee.act.gov.au](http://www.publictrustee.act.gov.au) for information on our services.

(\*It is a condition that the Public Trustee be appointed executor or co-executor under all Wills prepared by us)

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## ATTACHMENT C - LETTER SEEKING DISCOUNT ON VENUE COST



### PUBLIC TRUSTEE AND GUARDIAN

ABN 45 801 644 305

When Replying  
Please Quote:

Telephone: (02) 6207 9800  
Facsimile: (02) 6207 9811

9 September 2016

Mr Ian McKay  
Chief Executive Officer  
Canberra Southern Cross Club  
92-96 Corinna Street  
Woden ACT 2606

Dear Mr McKay

#### **PUBLIC TRUSTEE AND GUARDIAN'S SEMINAR ON WILLS AND ENDURING POWERS OF ATTORNEY.**

I am writing to you in connection with two public seminars on Wills and Powers of Attorney to be conducted by this office in the Canberra Southern Cross Clubs Jamison on Wednesday 26th October 2016 and Woden on Tuesday 25th October 2016.

The seminars are a free community service provided by Public Trustee and Guardian (PTG) designed to increase awareness amongst community members on the importance of having a professionally prepared Will and Enduring Power of Attorney.

I have been in contact with your Sales Manager Tara Byrne to discuss arrangements for the events.

In October 2015, a similar seminar was conducted at the Southern Cross Clubs Jamison and Woden, as a part of Wills Week and both events proved to be very successful. PTG believes that the facilities provided by the Southern Cross Club's compliments the demographic of the attendees.

The general make-up of people who attend is a cross-section of Canberra citizens, including people who are concerned about making proper arrangements in respect to their health, welfare and assets in the event of their incapacity or death.

Feedback from those attending last year's events has been excellent. The content and quality of presentations was praised, together with the excellent venues.

**WILLS • ESTATES • TRUSTS • GUARDIANSHIP • FINANCIAL MANAGEMENT •  
POWERS OF ATTORNEY**

PO Box 221 Civic Square ACT 2608  
221 London Circuit Canberra ACT 2601  
Web: [www.ptg.act.gov.au](http://www.ptg.act.gov.au) Email: [ptg@act.gov.au](mailto:ptg@act.gov.au)

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I am writing to request that you and Board representatives consider agreeing to waive the room hire fee at both facilities as you kindly did in October 2015.

We would expect this seminar to continue to draw high attendance figures, which will benefit both the community, the Canberra Southern Cross Clubs and Public Trustee and Guardian.

I look forward to your favourable response. Please contact Tracey Jay of this office on 6207 9800 or by return email. [Tracey.jay@act.gov.au](mailto:Tracey.jay@act.gov.au).

Yours sincerely

A handwritten signature in black ink, appearing to be 'Andrew Taylor', written in a cursive style.

Andrew Taylor  
PUBLIC TRUSTEE

## ATTACHMENT D - CHECKLIST

<b>Decide whether Seminar/Forum format</b>	
<b>Date/times</b>	
<b>Venues -</b> <ul style="list-style-type: none"> <li>• Contact venue</li> <li>• Book venues for event and also for Expo</li> <li>• Letter to venue seeking discount waiver of room hire</li> <li>• Organise media as required at venue eg laptop/mikes etc</li> </ul>	
<b>Prepare ads and organise placement with media</b> <ul style="list-style-type: none"> <li>• Prospect placing on Access Canberra TV screens at Shopfronts</li> </ul>	
<b>Prepare Posters/flyers and prepare email list</b>	
<b>Showbags</b>	
<b>WHOG email including Poster</b>	
<b>Email to Community organisations/ seniors clubs etc</b>	
<b>Prospect potential radio advertising</b>	
<b>Staff/presenters roster</b>	
<b>Moderator - organise if needed</b>	
<b>Update PowerPoint with event name/dates etc</b>	
<b>Organise prizes</b>	
<b>Complimentary Will Vouchers</b>	
<b>Take to venue on day -</b> <ul style="list-style-type: none"> <li>• Banners</li> <li>• Showbags</li> <li>• Prizes and raffle tickets</li> <li>• Complimentary Will Vouchers</li> <li>• Tablecloth</li> <li>• PA, AV, laptop, projector screen, litepro (as required)</li> <li>• Powerpoint on memory stick</li> <li>• Camera</li> <li>•</li> </ul>	
<b>Book Cars as required</b>	
<b>PTG Website</b>	