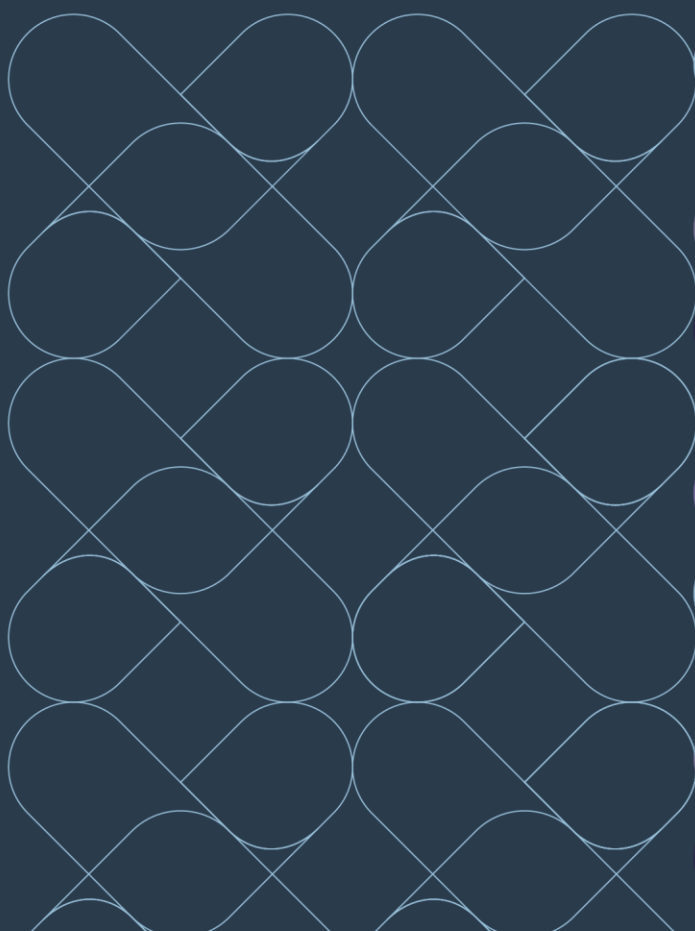




PUBLIC TRUSTEE ADVISORY
and MONITORING BOARD

Annual Report 2024-25





Accessibility

The report provides detailed information about the Public Trustee Advisory and Monitoring Board's performance for the 2024-25 financial year.

We are committed to providing accessible services to Queenslanders from all culturally and linguistically diverse backgrounds. If you have difficulty in understanding the annual report, you can contact the Public Trustee Advisory and Monitoring Board by email info@ptamboard.qld.gov.au or free call the Translating and Interpreting Service on 1800 131 450 and we will arrange an interpreter to effectively communicate the report to you.

Published by the Public Trustee Advisory and Monitoring Board, October 2025.

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Acknowledgement of Traditional Owners and Custodians

The Public Trustee Advisory and Monitoring Board (**the Board**) acknowledges the Traditional and Cultural Custodians of the lands, waters and seas across Queensland, pays respect to Elders past and present and recognises the role of current and emerging leaders in shaping a better service system. We recognise the First Nations people in Queensland are both Aboriginal peoples and Torres Strait Island peoples, and support the cultural knowledge, determination, and commitment of Aboriginal and Torres Strait Islander communities in caring for the wellbeing of our peoples for millennia.

The term 'First Nations peoples' and 'Aboriginal and Torres Strait Islander peoples' are used interchangeably in this report. Acknowledging First Nations peoples' right to self-determination, the Board respects the choice of Aboriginal and Torres Strait Islander people to describe their own cultural identities which may include these or other terms, including sovereign peoples or traditional place names.

The Board additionally acknowledges all First Nations people who are the customers, or family of customers, of the Queensland Public Trustee (**QPT**).

The Honourable Deb Frecklington MP
Attorney-General and Minister for Justice and Minister for Integrity
1 William Street
BRISBANE QLD 4000
Dear Attorney-General

I am pleased to submit for presentation to Parliament the 2024-25 Annual Report of the Public Trustee Advisory and Monitoring Board (**the Board**) as required by 117ZZA of the *Public Trustee Act 1978*.

This is the Board's third Annual Report, with the Board having been established on 9 December 2022.

The Board continued its cooperative relationship with the Queensland Public Trustee throughout the 2024-25 financial year, with the CEO of the QPT attending most meetings to give presentations on various aspects of the QPT's operations.

Having concentrated its efforts in 2023-24 on cementing its working relationship with the Queensland Public Trustee (QPT) and making recommendations to the QPT regarding improvements in its operations, the Board has been preparing to make strategic recommendations to yourself, as Attorney-General, on areas it sees as priorities for the long-term sustainability and function of the QPT to best practice standards and a level that meets contemporary community expectations. In June, I forwarded a recommendation relating to confidentiality requirements among QPT customers.

The Board met seven times through the year, with the Public Trustee presenting at six of these to assist the Board.

I wish to sincerely thank all Board Members for their continued engagement and enthusiasm and the variety of perspectives they each bring.

The Board looks forward to continuing to work with the QPT and yourself with the ultimate aim of assisting the QPT reach nation-leading standards of trustee service delivery to all stakeholders, including customers, families, agencies who work with customers and the wider Queensland community.

Yours sincerely



Geoff Rowe

Chairperson

Public Trustee Advisory and Monitoring Board

22 October 2025

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Foreword from the Chairperson, Public Trustee Advisory and Monitoring Board

I am pleased to present the 2024-25 Annual Report of the Public Trustee Advisory and Monitoring Board (the Board). The Report outlines the activities undertaken over the last financial year.

During 2024-25, the Board met seven times, having robust discussions each meeting about a wide array of topics focused on modernising and improving QPT's support to vulnerable Queenslanders.

During this financial year, the Board focused on utilising the considerable amount of information gained in the first 18 months of its tenure, garnered from the QPT, the Board Secretariat's own series of research papers and other sources, to form more focused recommendation papers to both the QPT and, importantly, the Attorney-General. One such recommendation has been forwarded to the Attorney-General, with at least one more expected before the end of the tenure of the current Board on 8 December 2025.

On the note of the impending end of the current Appointed tenure, I wish to convey my sincere gratitude to all Board Members, both Appointed and Permanent, during my three years as inaugural Chairperson. It has been a great privilege to see the Board established, begin its functions and, lastly, making important and well-considered recommendations to the Attorney-General as per the Act. Working with a large group of people, with different experiences, backgrounds and perspectives has been made a pleasure by those involved.

Finally, I wish to reiterate that, in performing its functions, the Board will continue to act independently and in the public interest.

Yours sincerely



Geoff Rowe

Chairperson

Public Trustee Advisory and Monitoring Board

The Public Trustee Advisory and Monitoring Board

In January 2021, Queensland's (then) Public Advocate, Ms Mary Burgess, delivered her report *Preserving the financial futures of vulnerable Queenslanders: A review of Public Trustee fees, charges and practices (the Public Advocate's report)* to the (then) Attorney-General, the Honourable Shannon Fentiman.

The Public Advocate's report contained 32 recommendations in relation to the Public Trustee's fees, charges and practices, including:

Recommendation 30: Consider additional oversight mechanisms

The Queensland Government should consider whether the Public Trustee and its clients would benefit from additional oversight and/or reporting mechanisms to improve the Public Trustee's performance, transparency and public accountability.

In response to the above recommendation, amendments to the *Public Trustee Act 1978 (the Act)* were undertaken to establish the Public Trustee Advisory and Monitoring Board (**the Board**) – the amendments were assented to by the Governor of Queensland, Her Excellency the Honourable Dr Jeannette Young AC PSM on 20 May 2022.

This is the third annual report of the Board, covering the Board's second full year of operating on the principles and guidelines established in the 2022-23 financial year.

The Board is pleased to advise that during 2024-25, it has continued to provide an oversight mechanism that has worked to improve the PT's performance and accountability in 2024-25, as per Recommendation 30 above.

The legislative basis of the Board

The legislative basis of the Board is enshrined in Part 8A of the Act.

Section 117Y of the Act stipulates the functions of the Board as follows:

- (a) to monitor and review the performance of QPT's functions;
- (b) to monitor complaints received by QPT about the performance of QPT's functions;
- (c) to monitor and review QPT's processes for managing complaints mentioned in paragraph (b);
- (d) to give written advice or make written recommendations to the Minister about the following—
 - (i) changes to legislation, or improvements to the policies, practices, resources, services or training of QPT, to ensure QPT can effectively perform its functions;
 - (ii) improvements or enhancements to the performance of QPT's functions to promote the interests of QPT's clients, particularly clients with impaired decision-making capacity;
- (e) if asked by the Minister, to give written advice or make written recommendations to the Minister about matters relating to the performance of QPT's functions;
- (f) to give advice or make recommendations to QPT about matters relating to the performance of QPT's functions;
- (g) another function given to the Board under the Act.

Additionally, Section 117ZA provides that in performing its functions the Board must act independently and in the public interest, and is not subject to direction by anyone, including the Minister, in how it performs its functions.

Membership of the Board as at 30 June 2025

Appointed Members

Chairperson – Mr Geoff Rowe – Mr Rowe is the Chief Executive Officer of Aged and Disability Advocacy Australia and brings to the Board 40 years' experience in human services, including senior executive positions in the Queensland Government and not-for-profit sector. His current statutory appointments include the Queensland Voluntary Assisted Dying Review Board and the Australian Health Protection Principal Committee's Aged Care Advisory Group.

Professor Jennifer Cullen AM - Professor Cullen, a descendant of the Bidjara and Wakka Wakka people, is CEO of Synapse Australia Ltd. Professor Cullen has over 30 years' experience in disability and aged care services and has received many awards relating to support and advocacy for vulnerable persons.

Ms Aimee McVeigh - Ms McVeigh is a lawyer and human rights advocate who has significant experience acting for and advising people with disability and their families. Ms McVeigh is currently the CEO of the Queensland Council of Social Services and was previously the Director of Disability Law Queensland and also established the private sessions function at the Disability Royal Commission. Ms McVeigh is a graduate of the Institute of Company Directors and has held numerous board roles, including currently being appointed to the Metro North Health and Hospital Board.

Ms Joanne Peulen - Ms Peulen is a board and governance specialist and consultant with expertise in strategic financial and business risk management. Her 24 years' career experience includes leading high-performing teams in the energy sector, advising government departments and corporations on policy, process and systems design and implementation, and 6 years as a board member in the not-for-profit and disability sector. She also has lived experience with disability.

Ms Kym Vickery - Ms Vickery is an experienced finance professional with over 30 years working in the financial services sector. She has extensive financial and public sector leadership experience, having held senior roles within Queensland Treasury, Queensland Investment Corporation, Ergon Energy and Queensland Treasury Corporation. Her industry knowledge covers debt and investment markets, superannuation, finance, risk management, and corporate governance. She also has a deep understanding of Queensland public sector finances and legislation.

Permanent Members

Ms Helen Dogan, Acting Deputy Under Treasurer, Queensland Treasury. Ms Dogan is a senior executive with over 20 years' experience in government, working in policy and financial roles across a range of portfolios, including Treasury, Agriculture and Fisheries, Health and Energy.

Ms Sharon Bailey - Deputy Director-General, Department of Justice. Ms Bailey has held senior executive positions with Department of Energy and Climate Change, the Department of the Premier and Cabinet and the Commonwealth Department of Social Services. Ms Bailey has led large teams and worked across various areas of government responsibility including procurement, migrant settlement, community cohesion, education, arts, public works, community services development and child protection.

Ms Kathy Parton, Deputy Director-General, Department of Women, Aboriginal and Torres Strait Islander Partnerships and Multiculturalism. Ms Parton is a senior executive with more than 20 years' experience in government, working across departments and statutory bodies.

Mr Max Wise, Deputy Director-General, Department of Families, Seniors, Disability Services and Child Safety. Mr Wise has worked for the Queensland Government for over 35 years, including almost 20 years in senior leadership positions in regulatory, oversight and service delivery roles, across a range of portfolios including justice, treasury, health, child protection, disability and seniors.

Board Meetings during 2024-25

The Board holds Regular Meetings to achieve its core functions of monitoring the operations of, and providing timely and relevant advice and recommendations to, the Attorney-General and QPT.

Regular Meetings are held on a monthly basis, generally on the first Friday of each month. During 2024-25, the Board held seven Regular Meetings, as follows: Regular Meetings of the Board throughout the 2024-25 financial year were held on:

5 July 2024	2 August 2024	4 October 2024	1 November 2024
7 February 2025	4 April 2025	2 May 2025	

At each of the Regular Meetings, a quorum was available for decision-making purposes. The Board had planned a regular meeting with the Public Trust Investment Board scheduled to attend; however this had to be cancelled at short notice due to former tropical cyclone Alfred.

The Public Trustee, Mr Samay Zhouand, and senior members of his staff attended 6 of the Board's Regular Meetings to present on various aspects of QPT's operations and strategies as requested by the Board.

Board activities for 2024-25

The Board spent considerable time following its establishment in 2022-23 planning its longer-term goals and priorities over its three-year tenure. At that time, the Board established the below key goal-based focus areas of work.

- **Governance and Structure:** QPT is high performing with independent governance structures.
- **Fees and Charges:** QPT's fees and charges are fair and reasonable, and transparently calculated.
- **Complaints:** QPT's complaints processes are accessible, transparent and respond to customer complaints effectively.
- **Culture and Strategy:** QPT's culture and strategy is consistent with community expectations and in line with the *Human Rights Act 2019*.

In 2024-25, the Board undertook activities in alignment with these focus areas as described below.

QPT's Governance and Structure

The Board devoted considerable time and effort in 2024-25 to deepening its understanding of QPT's establishing legislation, legal structure and organisational governance framework, including the roles of QPT's internal boards, committees, and offices, namely:

- the Board of Management;
- the Public Trust Office Investment Board;
- the Audit and Risk Management Committee;
- the ICT and Digital Steering Committee; and
- the Office of the Customer Advocate.

The Board undertook an extensive research project in relation to QPT's existing legislation, legal structure and governance framework. This project identified potential changes that could be made to QPT's existing structure to enhance QPT's performance, transparency and public accountability. The Board intends to discuss these potential changes with QPT, with a view to making recommendations to the Attorney-General as to how QPT might be optimally structured to ensure that the organisation is best able to meet its customers' needs into the future.

Fees and Charges

After contributing to QPT's public consultation process on proposed changes to its fees and charges for its key Financial Management, Deceased Estate and Trust services in 2023-24, the Board continued to monitor the progress of QPT's ongoing review of its fees and charges in 2024-25. The Board was supportive of QPT's continued freeze on annual indexation of its fees and charges, and of the continued waiving of real estate property fees and incidental outlays fees for Financial Management customers. The Board looks forward to contributing further to QPT's ongoing review of its fees and charges in 2025-26.

Complaints Management

Following the Board's review of QPT complaints processes and the QPT's implementation of the Board's recommendations for improvements to those processes in 2023-24, the Board turned its efforts to monitoring trends in complaints received by QPT in 2024-25. In this regard, the Board is appreciative of QPT's cooperation in supplying the Board with complaints reporting data on a quarterly basis. This complaints data is being and will continue to be used by the Board to identify trends in the underlying causes of complaints and consequent improvements that QPT can make to its policies, procedures and service delivery.

The Board's working relationship with QPT

Continuing on from 2023-24, the Board further solidified and enhanced its high degree of engagement with the QPT. Throughout the year, QPT presented on specific topics requested at Board meetings, and was always responsive to requests made for information and materials to assist the Board in carrying out its functions.

The Board thanks the Public Trustee, Mr Samay Zhouand, and the members of QPT's executive and staff who attended Board meetings to deliver many presentations and answer questions, and also QPT staff who assisted by providing information and materials requested by the Board. The QPT's evident willingness to engage with the Board's advice and implement the Board's recommendations further was both appreciated and encouraging for the continued evolution of the operation of the Board and service delivery improvements of the QPT.

Progress of Recommendation Papers to the Attorney-General

As below, the Board forwarded a formal recommendation to the Attorney-General regarding current confidentiality requirements on customers of the QPT, a requirement of the Guardianship and Administration Act 2000. This recommendation was the result of some five months of research, discussion and consultation. The Board anticipates submitting at least one further formal recommendation to the Attorney-General before December 2025.

Board Research Program

Building on the substantial study of public trustee organisations in each Australian State and Territory and New Zealand undertaken in 2023-24, the Board's research in 2024-25 focussed on:

- the medium- and long-term financial sustainability of the QPT
- the guardianship gag laws in place, in comparison to other jurisdictions with similar laws in place or jurisdictions which have removed (or partially) removed such laws
- roles of various committees within the current governance structure
- current and future governance structure of the QPT
- statistical analyses of large amounts of data as supplied by the QPT, including complaints data and risk reporting.

This research has informed the Board's formal recommendations, made and soon to be made, to the Attorney-General. The Board will, as a matter of course, continue making recommendations to the QPT.

Board Recommendations to the Attorney-General

As per Section 117Y(d) of the Act, it is part of the Board's responsibility to make recommendations to the Attorney-General regarding 'changes to legislation, or improvements to the policies, practices, resources, services or training of QPT, to ensure QPT can effectively perform its functions'. On 26 June 2025, the Board made its first formal recommendation to the Attorney-General, in regard to existing confidentiality requirements on current or former customers of the QPT. The Board looks forward to discussion in regard to this recommendation.

Monitoring Framework

The Board completed a minor update of its Monitoring Framework during 2024-25, although the goals, alignments and criteria remain materially the same. The framework, developed in 2023-24, was developed to provide structure and priorities for the Board to follow in monitoring QPT's performance and measuring QPT's progress against key criteria. The framework previously had input from the QPT, the Public Advocate, and the Queensland Disability Advisory Council, and continued to be a sufficiently robust document to last into the future with minimal amendment.

The Monitoring Framework, therefore, continues to provide a transparent and coherent structure for the Board's monitoring of the performance of QPT's functions in 2024-25 and beyond.

Board Reporting to the Attorney-General

With the change in government, reporting on a quarterly basis was interrupted. However, the new Attorney-General met with the Chair and Member McVeigh on 26 March 2025, allowing a brief verbal update on the Board's activities. The first regular report to the Attorney-General was sent on 27 June 2025, with reporting intended to be quarterly from that point on.

Board Website

The Board continues to have a web presence, with its website (www.ptamboard.qld.gov.au) available with Board activities, reports, and membership. This will be updated periodically to reflect new information.

Acknowledgments

The Board wishes to thank the following for their assistance throughout 2024-25:

- The Public Trustee, Mr Samay Zhouand, for his ongoing engagement and co-operation with the Board, and QPT's Board of Management for their attendance and valuable input at selected Board meetings.
- The Department of for its ongoing support as the host agency to the Board.
- The Board Secretariat, (consisting of Mr Michael Meehan – Manager, Mr Geoff Cameron – Principal Policy Officer, and Ms Kahren Giles – Administrative Officer) for providing the full range of secretariat services.

Appendix 1 - Member attendances and fees for 2024-25

Public Trustee Advisory and Monitoring Board					
Act or instrument	Public Trustee Act 1978, Part 8A.				
Functions	To monitor and review the performance of the Public Trustee’s functions, and to give advice and make recommendations to the Public Trustee and/or the Attorney-General about matters relating to the performance of the Public Trustee’s functions.				
Achievements	See above, pages 8-10.				
Financial reporting	Not exempted from audit by the Auditor-General.				
Remuneration					
Position	Name	Meetings Attended	Approved annual, sessional or daily fee	Approved sub-committee fees if applicable	Actual fees received
Chairperson	Geoff Rowe	7	4 hrs or less: \$195 More than 4hrs: \$390	N/A	\$2,730
Appointed Member	Jennifer Cullen	6	4 hrs or less: \$150 More than 4hrs: \$300	N/A	\$1,800 *
Appointed Member	Aimee McVeigh	6	4 hrs or less: \$150 More than 4hrs: \$300	N/A	\$1,800
Appointed Member	Joanne Peulen	6	4 hrs or less: \$150 More than 4hrs: \$300	N/A	\$1,800
Appointed Member	Kym Vickery	6	4 hrs or less: \$150 More than 4hrs: \$300	N/A	\$1,800
Permanent Member	Sharon Bailey	6	N/A – Permanent Board Members do not receive payment		
Permanent Member	Helen Dogan	3			
Permanent Member	Kathy Parton	6			
Permanent Member	Max Wise	7			
No. scheduled meetings	7				
Total out of pocket expenses	N/A				

* Actual fees paid exclude superannuation and include fees due to members for work completed in the current financial year. Due to delays in processing, some fees may be actually paid in the following financial year.