

## Delivering Trustee Services for the Western Australian Community



### The Business Challenge.

Deliver and manage a broad range of trustee related services, including legal, financial and asset management services, wills and deceased estate administration and charitable giving.

### The Solution.

Unisys Application Services to support, maintain and enhance the trustee's core client management system, which manages \$1.2 billion worth of net client assets, and supports ~5,300 active trustee clients, ~100,000 registered wills and ~650 new deceased estates per year.

### Results and Benefits.

- Client base continues to grow (approximately 13% in 2015-2016), while maintaining client satisfaction without significant changes in staff levels
- Improved accessibility, information sharing and the ability to validate information from multiple sources
- Enabled the launch of the Give2Good Community Foundation to encourage Western Australians to 'give to good' causes; testators have so far promised over \$6 million to the foundation in the form of charitable bequests

“The Public Trustee provides essential trust management and estate administration services for Western Australians, including dealing with family and stakeholders located interstate and overseas. Unisys delivers a highly reliable client management system with the flexibility to implement functionality for new services. We have a long standing partnership that has delivered excellent outcomes over this period. They truly understand the importance of the services we provide to the Western Australia community.”

**Terry Hearn**  
**Director – Corporate Support**  
**Western Australia Public Trustee**



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