

Wills – how we’re reaching more Victorians

As Victoria’s largest Will writer, State Trustees prepared 2,413 Wills during the 2009/10 financial year, an increase of 14% above last year.

Our team comprises eight fully qualified lawyers and two paralegals. They have the knowledge and expertise to offer objective and impartial legal advice, and structure our clients’ Wills to best suit their individual circumstances. This can help avoid pitfalls and potential for family conflict later on.

State Trustees estimates that approximately 20% of people in Victoria die intestate, meaning they die without a valid Will. As a result, their assets are distributed according to a set legislative formula, which does not always reflect what they would have wanted.

In addition, many people write a Will but fail to update it as their circumstances change. For example, divorce or separation (their own, or someone in their family); changes in assets held; and the passing of beneficiaries can all result in assets ending up in the hands of someone who was not intended to benefit.

To help protect people from the consequences of failing to make or update a Will, State Trustees has been offering our service to more clients by building our presence in regional Victoria. With a regular travel program to major regional centres throughout 2009/10, State Trustees can now make Wills for more Victorians who would otherwise find it difficult to access our expert advice.

Where there’s a Will, there’s a (better) way

Our new and enhanced Will writing technology, Chameleon, has helped facilitate this greater presence in regional centres, as well as to serve more clients in the Melbourne Metropolitan area.

Twelve months since its introduction and many Wills later, we’re pleased to report that Chameleon has delivered everything it promised. In addition to helping us reach more clients, the benefits include:

- Increased productivity and efficiency of our Will writers, as evidenced by our 14% increase on last year’s volumes
- Time and cost savings for clients. In 90% of cases, everything can be done on the spot without the need for them to return for a second appointment for further discussion or signing
- Dual-screen capability allows clients to view details and options on screen as their Will is being prepared
- The ability to include a personalised and unique commentary for each Will created by the system
- Assisting the Will writer to identify other services which may be of value so they can provide a more comprehensive consultation. As an example, this year saw a 43% increase in clients preparing Financial Enduring Powers of Attorney (EPAs) and 20% of clients included a charitable intent in their Wills
- The ability to offer a more mobile service by writing Wills for clients in their home if they are unable to get to one of our offices
- It being the first interactive intelligent product of its kind to allow such a complex range of options to be automated, without the need for hand drafting specific legal clauses. This can be time-consuming and expensive for clients
- Increased Will checking productivity, freeing up staff to write more Wills, or to visit clients in regional areas or in their homes
- Production of a more comprehensive Will which assists the executor when it comes time to administer the estate

The generic software used to build Chameleon has been licensed in a number of countries around the world. However, the specifications that State Trustees has had purpose-built into this software have resulted in Chameleon becoming a leading edge tool.

Priam Nandan, State Trustees lawyer (pictured left), says that many of her clients have been thrilled to receive their documents completed at the time of their appointment. They have also complimented the dual screen system which enables them to be more involved in the process.

