



April / Autumn 2019

What's On  
The  
Calendar?

## April

On Monday 29<sup>th</sup> April 2019 the Trustees invite you to attend a Special General Meeting hosted by video conference Nationwide. A letter with more information will be posted in early April, with more information available on our website.

## May

The New Zealand Disability Support Network will be hosting its annual conference in Wellington on Wednesday 29<sup>th</sup> and Thursday 30<sup>th</sup> May 2019. P.A.T will be exhibiting at the conference, and Erika Butters (Advocacy Director) and Sue Hobbs (Safeguarding Director) will be delivery a Keynote address on safeguarding principles and tools.

## June

Our AGM will be held on Wednesday 26<sup>th</sup> June 2019, with all membership and whanau invited to attend via video conferencing Nationwide. More information will be distributed and in coming weeks.

## PAT and SAFA: Partnership Next Steps

You may recall that our last newsletter announced a new partnership between The Personal Advocacy Trust and the Safeguarding Adults from Abuse Collective. The work to achieve this partnership is now well under way. Here are a few things that we have done already:

- Appointed a Trustee with safeguarding expertise and family violence prevention experience. Her name is Michelle Clayton and she is the CEO of Family Action.
- Appointed a Safeguarding Adults National Director. Her name is Sue Hobbs, and she has been working to advance safeguarding processes in New Zealand for the last eleven years.
- Revised our Trust Deed.

And these are a few things that we have planned for the coming months:

- Confirm a new name and branding for the organisation. We are seeking your feedback on this at the Special General Meeting on 29<sup>th</sup> April 2019.
- Appoint a Safeguarding Co-ordinator in Auckland
- Appoint a Safeguarding Co-ordinator in Mid-Central Region



## Who are our Trustees?

The Personal Advocacy Trust has recently welcomed two new Trustees. These are Paul 'Taz' Holmes who is a member representative on the Board, and Michelle Clayton from Family Action who brings a wealth of experience and knowledge from the violence prevention sector.

Barney Cooper (Chair)

Janine Stewart

Michelle Clayton

Gerard Letts

Don Bagnall

Kate Cooke

Ross Steele

Paul 'Taz' Holmes

John Stribrny

# Reviewing our Trust Deed

Our Trust Deed has remained largely intact since it was first drafted in 1969. Over the last several months we have done much work to modernize, simplify and broaden the scope of the Trust Deed.

Some important revisions:

- The Trust is now able to extend services to all 'adults at risk' at the discretion of the Trustees. An 'adult at risk' is:
  - An adult who has care and support needs,
  - is experiencing (or is at risk of) abuse, neglect or harm
  - and because of their care or support needs, is unable to protect her/himself against the harm, abuse or neglect (or risk of it).
- Support services offered will include advocacy, supported decision making assistance, co-ordination of a safeguarding interagency approach, and the potential for developing additional services in the future.
- Trustees now serve for a term of four years, with a maximum of three terms

## Spotlight: Discretionary Trusts

The Personal Advocacy Trust can administer Discretionary Trusts for its members.

Many parents wonder how they will be able to provide for and protect the financial security for their son or daughter after they have died. Discretionary Trusts allow for funds to be held and used exclusively for the benefit, support and wellbeing of the named beneficiary.

Safeguards and disbursement approval processes ensure funds are not prematurely depleted or abused. Discretionary Trust funds administered by The Personal Advocacy Trust are securely invested, accounted and reported on, and are easily accessible to the beneficiary - the member, by application to the Board. The Personal Advocacy Trust charges a nominal 1% annually for this service, with nil application, disbursement or administrative fees.

Discretionary Trusts may be established for members at the time of enrolment or anytime thereafter, including through Testamentary will. It is advisable that a Letter of Wishes be supplied as an important document with your instructions as to how you would like your Trust to be administered or distributed after your death.

For further advice on how to establish a Discretionary Trust for your son or daughter, or on how to leave a bequest to The Personal Advocacy Trust in your Will, please get in contact with the National Director on 0800 728 7878.

## Free Advocacy Support: Rangatira Referrals

The Rangatira Fund is a philanthropic fund originally donated by the JR McKenzie Trust and maintained today through the generous donations of other charitable organisations. It is to be used to extend short term support to those whose financial circumstances would otherwise prevent them accessing services. Unfortunately, the Rangatira Fund cannot finance lifetime enrolment in the Trust.

To be eligible for funded advocacy hours from the Rangatira Fund the following criteria must be met:

- Be an 'adult at risk' as defined by the Trust Deed and at the discretion of the Trustees
- Have a short term crisis or issue requiring advocacy support
- Have financial constraints that prevent access to standard Fee-for-Service or Enrolment Advocacy.

Anyone can make a referral for consideration for funded short term advocacy support. Referrals are processed through our website, [www.PAT.org.nz](http://www.PAT.org.nz)

To find out more call 0800 728 7878, visit our website or get in touch by talking to your local Advocate.

MiRock Financial Services is an organisation that can offer specialist advice and services for parents planning for the future care and support for their disabled adult children.

Please see the flyer attached and contact Valentina Pereira for more information on 021 627 802.



Do we have the right contact information for you? To update your or your family members' details please get in touch:

[www.PAT.org.nz](http://www.PAT.org.nz)

0800 728 7878

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