



Public Trust Corporate Office  
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10 November 2021

Simon Mason

**By email:** (1) [fyi-request-17135-f837682b@requests.fyi.org.nz](mailto:fyi-request-17135-f837682b@requests.fyi.org.nz);  
(2) [simon.mason@kelevra.eu](mailto:simon.mason@kelevra.eu)

Dear Mr Mason,

**Official Information Act requests**

1. I refer to your three requests under the Official Information Act 1982 (the Act) dated 11 October 2021, for the following information:
  - a) Summary of all the complaints made against Public Trust, the outcomes and the value of any settlements on a p/a basis for the past three years;
  - b) Data on those customers who have successfully exited the relationship with Public Trust and how they did it (as clarified by your email dated 21 October 2021)
  - c) How I, a beneficiary can exit the relationship with Public Trust (as clarified by your email dated 21 October 2021)
  
2. Please note that our obligation under the Act is to provide information that exists and we do not create new information to answer your request. The information you requested and that exists is attached, as set out below:
  - a) Summary of all the complaints made against Public Trust, the outcomes and the value of any settlements on a p/a basis for the past three years**
    - i. Please note that this information is provided exclusive of any personal information, in order to protect the privacy of natural persons pursuant to Sections 9(2)(a) and 17 of the Act.
    - ii. Please note that the information provided is for all Public Trust complaints and it is not limited to estates.
    - iii. Please see attached: Appendix A: Public Trust complaints and associated costs from July 2018 to August 2021.
    - iv. Please see attached: Appendix B: Public Trust complaints data from July 2018 to October 2021.

**b) Data on those customers who have successfully exited the relationship with Public Trust and how they did it** (as clarified by your email dated 21 October 2021)

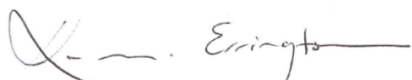
- i. Please note that this information dates from 2016, when our customer database was introduced.
- ii. Please note that this information is provided exclusive of any personal information, in order to protect the privacy of natural persons pursuant to Section 9(2)(a) and 17 of the Act.
- iii. Please see attached: Appendix C: Data on Public Trust exiting life interest estates.

**c) How I, a beneficiary can exit the relationship with Public Trust** (as clarified by your email dated 21 October 2021)

- i. Please note that this information is provided exclusive of any personal information, in order to protect the privacy of natural persons pursuant to Sections 9(2)(a) and 17 of the Act.
- ii. Please see attached: Appendix D: Exiting life interest estates information.
- iii. Please see attached: Appendix E: Public Trust Life Interest and Deferred Charges policy (as referred to in Appendix D).

3. To update you, we are working on your information request under the Privacy Act 2020, regarding information on your current complaint. We are aiming to respond to you on or before 19 November 2021, being 20 working days following the date of your request.

Yours sincerely,



**Katie Errington**

Intermediate Corporate Solicitor

Public Trust

Email: [katie.errington@publictrust.co.nz](mailto:katie.errington@publictrust.co.nz)