



PROTECTED ESTATES

The Aged and Infirm Persons Property Act provides for a Court to issue a Protection Order in circumstances where the opinion of the Court is that it is necessary, in the interest of the person or of those dependent upon the person, that the person's property should be protected as provided by the Act. The Court will appoint a Legal Manager to administer the estate of the protected person. CMS Private Advisory principals have been appointed Legal Manager to Protected Estates since the mid-1980s.

Our Services

The services we offer to a protected person are generally directed in the Court Order of our appointment; and in carrying out our duties, our services embrace the provision of all reasonable requirements of the protected person, within the financial limitations of the Court Settlement.

The essential elements of our services comprise:

- Close liaison with the protected person and their family.
- Assistance with the identification of special needs of the protected person and working in conjunction with them and their family to provide them.
- Careful investment of the settlement funds and an ongoing management of the investment portfolio, using independent expert advisors.
- Receiving all income and paying all appropriate expenses and outgoings.
- Budgeting and assisting in the management of every day financial and domestic matters.

- Preparation of financial statements and taxation returns.
- Preparation and lodgement of year-end report for the Court.
- Financial security of our services is provided by insurances and which are scrutinised by the Court.
- We will always be pleased to give further explanation of the services we can offer.

With many years' experience dealing with all the everyday issues associated with the management of a Protected Estate, our team is committed to making life as easy as possible for the protected person.



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The CMS Group

CMS Private Advisory – Chartered Accountants

CMS Private Advisory – Financial Planning

CMS Strategic – Automotive Advisors

CMS Strategic – Tourism & Hospitality

CMS Strategic – Cloud Solutions

CMS Strategic – Protected Estates

CMS Strategic – Agribusiness


CMS Strategic – Property

CMS Strategic – Growth Solutions

CMS | PRIVATE
ADVISORY
PROTECTED ESTATES

CMS Strategic Protected Estates is a specialist accounting, financial advisory service for protected persons and their families.

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