

### ANNO QUARTO

# **GEORGII VI REGIS.**

A.D. 1940.

### No. 36 of 1940.

An Act to make provision for the protection of the property of aged and infirm persons, to make provision for the perpetuation of testimony relating to testamentary documents, and for other purposes.

[Assented to 28th November, 1940.]

BE IT ENACTED by the Governor of the State of South Australia, with the advice and consent of the Parliament thereof, as follows:

#### PART I.

### PART I.

## PRELIMINARY AND GENERAL.

Short title.

1. This Act may be cited as the "Aged and Infirm Persons' Property Act, 1940".

Arrangement.

- 2. The provisions of this Act are arranged as follows:—
  - PART I.—Preliminary and general.
  - PART II.—Aged and infirm persons property.
  - Part III.—Perpetuation of testimony relating to testamentary documents.

Interpretation.

- 3. In this Act, unless the context or subject matter otherwise requires—
  - "court" means the Supreme Court:
  - "manager" means a person appointed to be manager of a protected estate under this Act; and where more than one person is so appointed, means either all the persons so appointed or each of those persons, as the context requires:
  - "Master" means the Master or Deputy Master of the Supreme Court:

- "protected estate" means the real and personal estate of a protected person, or such part thereof as is the subject matter of a protection order:
- "protected person" means a person who or whose estate or part thereof becomes the subject of a protection order.
- 4. (1) The whole jurisdiction of the court under this Act Exercise of jurisdiction may be exercised by any Judge, and the whole jurisdiction of by court. the court under Part II. may be exercised by the Master.

Cf. N.Z. 26, 1912, s. 3.

- (2) Any proceedings under Part II. may be heard in chambers, and any proceedings under Part III. shall be heard in chambers.
- 5. (1) The powers conferred by the Supreme Court Act, Rules of court. 1935-1936, to make rules shall be read as including power to Cr. N.Z. 26, 1912, 8, 30. make rules—
  - (a) for carrying into effect the several objects of Part II. and Part III. of this Act:
  - (b) relating to practice and procedure generally for the purposes of Part II. and Part III. of this Act, including rules as to costs and fees:
  - (c) prescribing the times for filing and manner of preparing statements to be filed by managers pursuant to Part II. of this Act.
- (2) The general practice of the court and the general rules of the court, with any necessary modifications and so far as the same are applicable and are not inconsistent with this Act or the rules under this Act, shall apply to all proceedings under this Act.
- 6. (1) If any circumstances arise for which no procedure procedure where case is provided by this Act, or if there is any doubt as to what is more case not provided for. the correct procedure, the Master, having regard to the general practice of the court, may direct (and ex parte if he thinks fit) what shall be done in any particular case, or that the procedure which has been adopted shall be deemed proper, or may make such order to meet the circumstances of the case as he deems fit: Provided that no such direction or order (even though not appealed against) shall operate so as to bar or prejudice the court from giving further or other directions at the hearing of any proceedings under this Act if, in the interest of justice, the court thinks fit so to do.
- (2) The powers given to the Master by this section may be exercised by any Judge.

### PART II.

### AGED AND INFIRM PERSONS PROPERTY.

Circumstances under which protection order may be made. Cf. N.Z. 26, 1912, ss. 4, 5.

- 7. (1) Where it is made to appear to the satisfaction of the court that any person is, by reason of age, disease, illness, or physical or mental infirmity—
  - (a) unable, wholly or partially, to manage his affairs; or
  - (b) subject to, or liable to be subjected to, undue influence in respect of his estate, or the disposition thereof, or of any part thereof; or
  - (c) otherwise in a position which in the opinion of the court renders it necessary in the interest of that person or of those dependent upon him that his property should be protected as provided by this Act,

the court may make a protection order in respect of the estate or part of the estate of that person.

(2) Where it is made to appear to the satisfaction of the court that any person is, by reason of his taking or using in excess alcoholic liquors, or any intoxicating, stimulating, narcotic, or sedative drug, unable, wholly or partially, to manage his affairs, whether such inability is continuous or occasional, the court may make a protection order in respect of the estate or part of the estate of that person, anything in the Inebriates Act, 1908-1934, or in any other Act to the contrary notwithstanding.

Application for protection order. Cf. N.Z. 26, 1912, s. 6.

- 8. (1) Every application for a protection order shall be made by originating summons, and may be made—
  - (a) by the person whose property is sought to be protected;
  - (b) by the husband or wife of such person;
  - (c) by any near relation by blood or marriage of such person;
  - (d) by the Public Trustee; or
  - (e) by any other person who adduces proof of circumstances which in the opinion of the court make it proper that such other person should make the application.
- (2) Where the application is made by any person other than the person whose property is sought to be protected, the originating summons shall be served upon such last-mentioned person, unless the court in any special case otherwise directs.

9. Before making any protection order in respect of any Examination of protected person, the court may in any manner which it thinks fit examine personally such person with or without the attendance of any other persons interested.

10. (1) If the court thinks fit to grant the application, the Appointment of manager. court shall, in and by the protection order, appoint the husband cf. N.Z. 26, or wife or near relation by blood or marriage of the protected 9. 1912, ss. 7, 8, person, or some other person, or any body corporate incorporated in this State by or pursuant to any law of this State, either alone or with any other person or persons, or the Public Trustee alone, to be the manager to take possession of and to control and manage all or such part or parts of the estate of the protected person as the court may direct.

- (2) The court may in any case appoint the Public Trustee alone to be manager, but shall not appoint any person to be manager together with the Public Trustee.
- (3) The court may, if it thinks fit, require any manager other than the Public Trustee to give such security to the Public Trustee as to the court seems fit for the due performance of the duties of manager.
- (4) If by the protection order any person other than the Public Trustee is appointed to be manager, the Master shall cause a copy of the protection order to be supplied to the Public Trustee.
  - 11. (1) The court may rescind any protection order.

Variation or rescission of protection order.

- (2) The court may from time to time vary any protection order so as to provide that the protection order shall apply to 1912, s. 7 (2). any part of the estate of the protected person to which, at the time of the variation, the protection order does not apply or so as to provide that the protection order shall cease to apply to any part of the said estate.
- (3) Subject as hereinafter provided in this subsection, a protection order shall be determined by the death of the protected person. If for any special reason the court thinks it desirable so to do, the court may direct that the protection order shall remain in force for any period not exceeding two months after the death of the protected person but in any such case and notwithstanding the direction of the court, the protection order shall be determined if grant of probate of the will or administration of the estate of the protected person is granted by the court pursuant to the Administration and Probate Act, 1919-1937.

Exemption of part of estate. Cf. N.Z. 26, 1912, s. 15.

- 12. (1) The court may by the protection order or from time to time, except from the estate of the protected person to be taken possession of and controlled by the manager any part of the said estate.
- (2) The court may permit any such part to remain in the possession of the protected person, or of the wife or husband or child of the protected person. The court may from time to time direct that such possession shall be uncontrolled or that it be subject to such terms and conditions as are, from time to time, imposed by the court.

Powers of manager. Cf. N.Z. 26, 1912, ss. 10, 11.

- 13. (1) The manager shall have the following powers, unless the court in any particular case otherwise orders:—
  - I. To take possession of the protected estate, and to recover possession thereof from any person holding the same:
  - II. To repair and insure against any contingency any part of the estate:
  - III. To demand, recover, and receive moneys and personal effects payable to or belonging to the protected person:
  - IV. To apply any moneys (whether arising from real or personal property, and whether income or capital) for the maintenance of the protected person, and the wife or husband and children of the protected person, and for the education of the children of the protected person, and in payment of the debts and liabilities of the protected person:
  - v. To carry on any trade or business theretofore carried on by the protected person, and to carry on the business of any partnership in which the protected person may be a partner.
- (2) The manager shall have such other powers and duties in respect of the protected estate as the court in and by the protection order, or from time to time, defines or directs, and the court shall have jurisdiction to confer any such powers upon the manager to be exercised generally in respect of the estate or any part thereof, or upon any special occasion, or in respect of any particular subject matter.

Continuance of provision for dependent persons. Cf. N.Z. 26, 1912, s. 12. 14. Where the protected person has, before the making of the protection order, made provision of any nature, whether regular or casual, for any person wholly or partially dependent on him, whether a relation or not, the court may in its discretion authorize the manager to continue the same or any less provision out of the protected estate.

15. (1) The manager shall apply such part of the corpus Application of and income of the protected estate as is not required for the purposes specifically defined in this Act in such manner as is authorized by subsection (2) or as the court from time to time directs.

- (2) The manager may invest the unapplied corpus or income of the protected estate in such securities, other than the mortgage of land, as are authorized by law for investment of trust moneys.
- (3) The court may direct the investment of the unapplied corpus or income of the protected estate in such investments as the court from time to time deems proper in the interest of the protected person or of those dependent upon him, and the court shall not be limited in respect of any such direction to such securities as are authorized by law for investment of trust moneys or by any provision of subsection (2).
- 16. The court may direct the sale, mortgage, lease, or other power to order sale, etc. disposition of the whole or any part of the protected estate by the manager; and may confer upon the manager any powers 1912, 8. 14. in respect of or in relation to the protected estate which it may deem necessary or expedient for the realization, investment, or better management thereof, or for the benefit or advancement in life of the children of the protected person; and, in particular, may confer any powers which the court may under any law or practice relating to trustees or to wards of court confer upon trustees or itself exercise.

17. Where more than one manager is appointed all the Provision managers must concur in every act, matter, and thing done in where two or more managers relation to the protected estate.

Cf. N.Z. 26, 1912, s. 16.

18. A manager shall be deemed to be a trustee for all the Manager deemed to be purposes of the Trustee Act, 1936.

trustee. Cf. N.Z. 26, 1912, s. 17.

- 19. (1) The manager of every protected estate shall, at such Filing of statement. times and in such manner as is directed by order of the court or prescribed by rule of court, prepare and file in the court a 1912, s. 18. statement, verified by the affidavit of the manager, showing the property comprised in the protected estate, and the condition thereof, and the manner in which the property has been dealt with, administered, or applied, and such other particulars as may be prescribed, or as may be in any special case directed by the court to be included in the statement.
- (2) In any case in which the manager is not the Public Trustee the manager shall forthwith after filing every such statement deliver to the Public Trustee a duplicate thereof, and shall thereafter exhibit to the Public Trustee such accounts and vouchers in relation thereto as the Public Trustee may require.

- (3) If any manager fails or refuses to file any such statement as provided aforesaid, or to deliver to the Public Trustee a duplicate thereof as aforesaid, or to exhibit to the Public Trustee any such accounts or vouchers as aforesaid, he shall be guilty of an offence punishable summarily and liable to a penalty not exceeding fifty pounds.
- (4) The Public Trustee shall cause every such statement delivered to him to be examined and reported upon either by himself or by any person he may appoint in that behalf, and shall cause the report to be filed in the court and a copy thereof to be transmitted to the manager by whom the statement has been delivered. No fee shall be payable on the filing of the report in the court.
- (5) For the purpose of examining any such statement, the Public Trustee may require the accounts of the manager to be audited by an auditor appointed by the Public Trustee.

Percentage of moneys collected payable to Public Trustee. Cf. N.Z. 26, 1912, s. 19.

- 20. (1) Where any person other than the Public Trustee is appointed manager in pursuance of this Act there shall be payable out of the protected estate by the manager to the Public Trustee, for the services rendered by the Public Trustee in respect of the estate, such remuneration as the court may from time to time direct.
- (2) If pursuant to subsection (5) of section 19, an auditor is appointed by the Public Trustee to audit the accounts of the manager, the manager shall pay to the Public Trustee out of the estate of the protected person the fees payable by the Public Trustee to the auditor appointed as aforesaid.

Exemption of manager from personal liability.
Cf. N.Z. 26, 1912, s. 20.

21. A manager acting in pursuance and exercise of any powers or duties conferred or imposed upon him by this Part or by the court shall not be personally liable in respect of any contract or engagement entered into with or any liability incurred to any person unless the manager has concealed from that person the fact that he was acting therein on behalf of the protected estate, but the protected estate shall be liable in respect of all such contracts, engagements, or liabilities, and the same may be enforced by proceedings against the manager in his representative capacity.

Proceedings. Cf. N.Z. 26, 1912, s. 21. 22. (1) The originating summons shall be the commencement of the proceedings which shall remain open for application to be made therein from time to time to the court by the manager, or the protected person, or the Public Trustee, or by any relation of the protected person or by any person interested in the protected estate. After such notice or service as the court thinks fit to direct, any person may be made party to the proceedings generally or in any particular matter, and the court may

grant and enforce against such party in matters relating to the protected person or the protected estate all judgments, orders, costs, and remedies, including injunction and mandamus, as the court might grant and enforce in any action against such party at the suit of the protected person or of the manager: Provided that if such party requires that an issue or issues of fact be stated and tried by the court, the court may direct that an issue or issues of fact be stated and tried, as between the manager in the names of the protected person and such party, by the court as upon the trial of an ordinary action or that the issue or issues of fact be stated and tried, as between the manager in the names of the protected person and such party, by the court in such other manner in accordance with the general practice of the court as is deemed appropriate by the court.

- (2) Upon any application to the court by the manager or the Public Trustee after the making of the protection order, it shall be necessary to serve with notice of the application only such persons or parties (if any) as the court on the application requires to have notice thereof.
- (3) The court may at any time discharge any party made party to the proceedings.
- 23. (1) The court may at any stage in any proceedings Inquiry by under this Part refer any matter arising out of those proceed- magistrate. ings for inquiry by a special magistrate.

- (2) The special magistrate shall, for the purposes of the inquiry, have power to administer oaths, to take affirmations, and to examine parties and witnesses. Any person who by subpæna issued out of the court is summoned to attend before the special magistrate shall be bound to attend in pursuance of the subpæna and shall be liable to process of contempt in case of default in attendance, and all persons swearing or affirming before the special magistrate shall be liable to such penalties for any wilful and corrupt false swearing or affirming as if the matters sworn or affirmed had been sworn or affirmed before the court.
- (3) The special magistrate shall report the result of his inquiry to the court and the court may, upon the report, make such order as it deems fit.
- 24. (1) In any case in which the Public Trustee is the Application to manager, the Public Trustee may, in respect of the exercise Public Trustee. of any power of the manager, apply ex parte to the court for approval, advice, or direction upon a written statement setting out the facts.

- (2) Upon any such application, it shall not be necessary to serve notice of the application on any person or party, unless the court so directs.
- (3) If the court sees fit to approve, advise, or direct on any such ex parte statement, the approval, advice, or direction shall be sufficiently evidenced by the fiat thereon, and it shall not be necessary to draw up any formal order. The statement together with the fiat shall be filed in the Master's office.

Exercise by manager of powers of protected person.
Cf. N.Z. 26, 1912, s. 22.

25. When a power is vested in any protected person in the character of trustee or guardian, or the consent of any protected person to the exercise of a power is necessary in the like character or as a check upon the undue exercise of the power, and it appears to the court to be expedient that the power should be exercised or the consent given, the manager may, in the name and on behalf of the protected person, and with the sanction of an order of the court made on the application of any person interested, exercise the power or give the consent in such manner as the order directs.

Execution of assurances, etc., by manager. Cf. N.Z. 26, 1912, s. 23.

26. The manager may, in the name and on behalf of the protected person, execute and do all such conveyances, transfers, leases, deeds, assurances, and things as may be necessary for effectuating any of the powers conferred upon him by this Act or by any order of the court.

Restriction of powers of protected person. Cf. N.Z. 26, 1912, s. 24.

- 27. (1) A protected person shall be incapable, without the leave of the court, of making any transfer, lease, mortgage, or other disposition of such part of his estate as is the subject-matter of a protection order or of any subsequent order, or of entering into any contract, except for necessaries; and every such transfer, lease, mortgage, or other disposition and every contract other than for necessaries shall be void.
- (2) Nothing in this section shall invalidate any transfer, lease, mortgage, disposition, or contract made or entered into by a protected person for valuable consideration if the other party thereto acted in good faith and without notice that a protection order had been made.

Registration of protection order. Cf. N.Z. 26, 1912, s. 25.

- 28. (1) A protection order may be registered under the provisions of the Registration of Deeds Act, 1935, as an instrument affecting the title to any land wherein the protected person has any estate or interest, legal or equitable.
- (2) A protection order shall be deemed to be an instrument purporting to affect land under the provisions of The Real Property Act, 1886-1939, and a memorandum thereof may accordingly be entered upon the register book with respect to any land whereof the protected person is the registered proprietor of any estate or interest under the provisions of that Act.

- (3) The manager, in the name and on behalf of the protected person, may lodge a caveat in respect of any land under the provisions of The Real Property Act, 1886-1939, to or in which the manager claims that the protected person is entitled or beneficially interested.
- (4) The provisions of this section shall apply notwithstanding the provisions of The Real Property Act, 1886-1939.
- 29. (1) The court may direct in any case that any testa-nestriction of mentary disposition by a protected person after the making capacity of protected. of a protection order shall be made only after such precautions protected person. as the court thinks fit to direct, and any testamentary disposi- Cf. N.Z. 26, 1912, 8. 26. tion made otherwise than as the court shall so direct shall be ineffectual for all purposes.

- (2) The court may, by such means as it thinks fit, cause inquiries to be made as to the existence of any will or codicil made and executed by the protected person prior to the making of the protection order (whether the will or codicil was made before or after the passing of this Act), and may direct that any such will or codicil shall be deposited with the Registrar of Probates. If it appears to the court that the will or codicil was made when the person making the same was subject to any of the incapacities defined in section 7 of this Act, the court may inspect the will or codicil, and may cause inquiries to be made, in such manner as to the court seems fit, whether the will or codicil expresses the present desire and intention of the protected person, and, if satisfied to the contrary, may in any case where such course is possible, cause the present desire and intention of the protected person to be ascertained to its satisfaction, and may authorize the execution by the protected person of a new will disposing of his estate in accordance with such present desire and intention.
- (3) Except as provided in this section, nothing in this Part shall affect the law relating to testamentary dispositions.
- 30. (1) An order for the appointment of a manager may be Application to made under this Part, although it may appear to the court that defectives. the person protected is a mental defective or that the estate Cf. N.Z. 26, 1912, s. 27. is one which might be administered under the Mental Defectives Act, 1935-1939, or that the protected person is a person who could be made the subject of an order under section 10 of the Inebriates Act, 1908-1934, but no such order for the appointment of a manager shall be made in respect of the estate of any person or if made shall be of any force or effect if—

(a) such person is a patient within the meaning of the Mental Defectives Act, 1935-1939; or

- (b) a committee has been appointed pursuant to the said Act to manage the affairs of that person; or
- (c) such person is the subject of an order under section 10 of the Inebriates Act, 1908-1934.
- (2) If any protection order is made under this Part in respect of the estate of any person and subsequent to the making of the protection order—
  - (a) the protected person becomes a patient within the meaning of the Mental Defectives Act, 1935-1939; or
  - (b) a committee is appointed pursuant to the said Act to manage the affairs of the protected person; or
- (c) the protected person becomes the subject of an order under section 10 of the Inebriates Act, 1908-1934, the protection order shall be deemed to be determined from the time the protected person became a patient, or a committee was appointed as aforesaid, or an order was made as aforesaid under section 10 of the Inebriates Act, 1908-1934, as the case may be.

Expenses and remuneration of manager. Cf. N.Z. 26, 1912, s. 28.

- **31.** (1) All expenses properly incurred by the manager in respect of the maintenance of the protected person, or the administration of the protected estate, shall be charged against and payable out of that estate; and in addition, there shall be payable in respect of all moneys forming part of the protected estate, and coming under the control of the manager, such remuneration by commission or otherwise to the manager, and such other charges, as are allowed by the court in any manner thought fit by the court.
- (2) If the Public Trustee is the manager, there shall be payable in respect of all moneys forming part of the protected estate and coming under the control of the Public Trustee, a commission in accordance with rules made pursuant to section 122 of the Administration and Probate Act, 1919-1937, or as is otherwise allowed by the court, and such other charges as may be allowed by the court.

Change of managers. Cf. N.Z. 26 1912, s. 29.

- 32. (1) The court may at any time, on the application of the manager, or on the application of the protected person or of any other person, on proof that there is good cause for so doing. make an order appointing any other person or persons as the manager of the estate in addition to or in lieu of the manager or appointing the Public Trustee as the manager of the estate in lieu of the manager.
- (2) The court may at any time, on the application of the protected person, or of the manager, or of any other person, rescind the order appointing the manager, on proof that the protected person is of sufficient ability to manage his own affairs.

PART III.

## PERPETUATION OF TESTIMONY RELATING TO TESTAMENTARY DOCUMENTS.

33. (1) Upon the application of any person (other than Application for order to pera protected person) who has made and executed any will or petuate testimony. codicil, the court may order that any testimony which may be material in relation thereto be perpetuated and for that purpose may make any order requiring the applicant or any other person to attend for examination upon oath before the court at any time and place. The court may give any directions as to the manner in which the examination is to be conducted, the evidence to be adduced therein, the parties who may attend on the examination and as to any other matters thought fit by the court.

- (2) Every such application shall be made by originating summons and may be made ex parte.
- (3) The court may direct that notice of the application or of any order made on such application be given to any person who may be interested in the disposition of the applicant's estate.
- (4) The testimony to be taken upon any such examination shall, subject to the direction of the court, be relevant to the following matters, namely:
  - I. The due execution of any will or codicil made by the applicant:
  - II. The testamentary capacity of the applicant:
  - III. Whether the applicant was subject to or liable to be subjected to undue influence in respect of his estate or the disposition thereof or any part thereof:
  - IV. Any other matter which would be relevant on any application or in any action relating to the grant or recall of probate or administration of the will or codicil:
  - v. Any matter which would be relevant in an application under the Testator's Family Maintenance Act, 1918.
- 34. (1) Any person claiming to be interested in the proceed-attendance at examination. ings may by leave of the court and upon such terms (if any) as the court may direct and at his own expense—

(a) attend the whole or any part of the proceedings in person or by a solicitor:

- (b) upon paying the costs occasioned thereby give or call such evidence as the court thinks fit.
- (2) Any person claiming to be interested may by leave of the court, be admitted to the place where the examination is being held during the examination, but shall not be entitled to take notes of the examination except by leave of the court.

Conduct of

- 35. (1) The court may put such questions to the applicant or any other person relating to any matters which the court considers relevant whether arising out of the cause of the examination or otherwise.
- (2) The court shall have power to disallow such portions of the evidence tendered or any questions put in cross examination to any person during the examination which the court considers go beyond the legitimate requirements of the examination.
- (3) Any questions which may be objected to and the purport of any evidence and any questions which may be disallowed by the court shall be noted in the depositions together with a short statement of the reasons for disallowing any such evidence or questions.

Discontinuance of proceedings.

**36.** The applicant may discontinue the proceedings at any stage upon paying the court fees then due. Upon any such discontinuance the court may order the applicant to pay to any person attending the proceedings by leave such costs as it thinks just.

Report.

37. After the termination of the examination, the court shall make a report touching the examination and the conduct and credibility of any witness or other person thereon.

Power of examiner to conduct examination.

- 38. (1) The court may order that the examination of persons ordered to attend for examination may be before the Master or a special magistrate (hereinafter referred to as "the examiner") and may give any directions as to the manner in which the examination is to be conducted and as to the testimony to be taken upon the examination.
  - (2) Subject to any directions of the court, the examiner—
    - (a) shall have the powers and duties of the court under sections 34 and 35 of this Act:
    - (b) shall have the powers of a judge and the court under sections 22, 23, and 24 of the Evidence Act, 1929-1933.
- (3) After the termination of the examination, the examiner shall make a report to the court touching the examination and the conduct and credibility of any witness or other person thereon.

- 39. (1) The depositions when taken upon any examination Deposit of depositions shall be authenticated by the court or examiner and forthwith and will or codicil. after the termination of the examination transmitted together with the report of the court or examiner and the will or codicil or a copy thereof certified by the court or examiner to be a true copy to the Registrar of Probates and deposited in the Probate Registry.
- (2) Any person interested may by leave of the court inspect or bespeak a copy or extract of the depositions (so taken) or report but no person other than the person who made the will or codicil shall be entitled to inspect the will or codicil or bespeak a copy or extract thereof except by the special leave of the court.
- (3) No original will or codicil so deposited shall be withdrawn except by leave of the court.
- 40. The court or a Judge may upon such terms (if any) Use of deposias it or he deems just order that the depositions and report testimony. be received in evidence in any proceedings or on any application relating to or concerning the will or codicil in respect of which the depositions and report were taken or made not withstanding any objection to the depositions on the ground that a party interested in the proceedings or application was not present when the depositions were taken.

In the name and on behalf of His Majesty, I hereby assent to this Bill.

C. M. BARCLAY-HARVEY, Governor.