

Job and Person Specification

Title of Role: Estate Services Officer

Remuneration Level: ASO2

Business Unit: Public Trustee

Type of Appointment: Casual/Term

Division: Customer Services

Position Number:

Job and Person Specification Approval

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DELEGATE

Primary Purpose

Provide a personal administrative service for estates directly or indirectly under the incumbent's control to ensure that customers' needs are satisfied within the provisions of relevant Acts, Regulations and office procedures.

Reporting Relationships

- Team Leader (ASO6) and works directly with a small work team.
- Manager, Estate Services

Key Relationships/Interactions

- General Public and Customers of the Public Trustee
- Employees of the Public Trustee Office
- Public Trustee Panel contractors
- State and Local Government Offices including but not limited to the Registry of Birth Deaths and Marriages, Electoral Roll Commission, Police and Australia Post.
- Local, interstate and overseas businesses, asset holders and financial institutions.

Key Challenges

- Assisting a small team to manage conflicting priorities and high volume caseloads within agreed timeframes
- Assisting with the regular communication and consultation with customers and stakeholders
- Dealing with conflict situations and with challenging customers
- Working within a legislative framework

Special Conditions

- May be required to work in any section of the Customer Services branches.
- Employees will provide the highest standards of customer service to customers at all levels by modelling service excellence that meets the needs of customers and enhances the corporate profile of the organisation.
- Employees are expected to maintain the integrity and security of all information for which they are responsible as a result of employment in the Attorney-General's Department.



AGD Conditions

- Participation in performance review and development;
- Actively participate in all mandatory training requirements;
- Abide by the standards in the Code of Ethics for the South Australian Public Sector (the Code); and
- Employment is dependent upon a National Police Certificate clearance that the AGD finds satisfactory.

Responsibilities

This Job and Person Specification provides an indication of the type of duties you will be engaged to perform. You may be lawfully directed to perform any duties that a person with your qualifications, skills and abilities would reasonably be expected to perform. The Estate Services Officer ASO2 is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Administration of Estates and Trusts	Ensure the effective planning, organisation and administration of estates and trusts directly or indirectly under the officer's control.	Estates are completed or annual reviews are conducted within agreed timeframes
	Interviewing beneficiaries and customers to obtain information and arranging follow-up interviews to agree to the administration process.	Customer communications are conducted in accordance with the relevant standards, procedures and TICK values
	Consulting with beneficiaries and customers and customers representatives.	All communications are recorded and responded to within agreed timeframes
	Preparing accurate financial statements.	Financial statements are accurate and prepared at least once annually where required.
	Timely completion of the administration of estates or trusts.	Estate and trusts are completed within agreed timeframes.
	Instructing and providing relevant information to internal and external service providers.	Instructions are issued to relevant service providers in a timely manner to meet established timelines.
	Arranging for the sale or transfer of assets	Relevant estate assets are collected, transferred or sold in accordance with the relevant standards, procedures and legislation
		Communicates and/or confers with customers regarding instructions related to the purchase, transfer or disposal of estate assets
	Arranging and maintaining insurance cover and property maintenance as required	All relevant assets are insured and where required are added to the property inspection list.
	Authorising and validating receipts and data input	Accurate and timely payments made and data integrity maintained.



Office Support	Contribute to the smooth operation of the office.	Operating up to but not exceeding delegated authority from the Public Trustee
		Providing support to the branch for meeting operational reporting requirements and targets.
Operational Efficiencies	Contribute to the operational efficiency of wills, trust and estate administration	Fully complies with the relevant acts, regulations and standards and procedures
Business Promotion	Contribute in obtaining new business for the office	Providing advice on suitable occasions on the range of customer products and services available
Compliance	Employees are responsible and accountable for adhering to the requirements of the OHSW Act 1986, relevant OHSW Regulations 1995; the Equal Opportunity Act 1984, the PS Act 2009, and the principles of diversity; and the Department's policies and procedures.	Active participation and contribution in responsible and safe work practices and abides by the Acts, Regulations, Policies and Procedures relevant to employees of the Department;
		Files are maintained according to internal standards and procedures;
		Documents and correspondence is filed according to States Records Act, 1997.



Technical Expertise

Qualifications, Skills, Knowledge and Experience relevant to the role

Technical Expertise (Essential)	<ul style="list-style-type: none"> Proven ability to determine priorities, cope with high volumes of work, plan and organise workloads, set targets, meet deadlines, and achieve high standard results. Ability to communicate effectively and write well-structured letters and reports Ability to manage conflict situations with tact and discretion and to negotiate successful outcomes. Understanding of need to act with tact, sound judgement, discretion and empathy when interviewing/providing advice to beneficiaries, the family of deceased and other persons associated with an estate, trust or potential new business. Ability to acquire case management and effective time management techniques. Ability to work independently with minimal supervision. Ability to be accurate and thorough. Skill with numerical calculations. Ability to quickly acquire some knowledge of the legislation relevant to the Public Trustee Office. Some experience in the use of Microsoft Office and word processing software packages. Knowledge of the principles and practice of OHSW, Equal Opportunity, the PS Act Employee conduct standards and diversity appropriate to the requirements of the position.
Technical Expertise (Desirable)	<ul style="list-style-type: none"> Ability to work in a team and effectively transfer knowledge to co-workers at all levels. Knowledge of the legislation relevant to the Public Trustee Office. Knowledge of a range of products and services offered by the Public Trustee Office. Appropriate post-secondary qualifications.

Behavioural Capabilities

Descriptors below detail the behavioural capabilities required for performance in the Estates Services Officer. KEY behaviours for this role are listed with the critical behaviours highlighted in **bold**. These behaviours have been drawn from a larger number of relevant behaviours in AGD's Performance Matrix. This broader group of behaviours are applicable to your ongoing success in the role.



Category and level	Behaviours
Strategic Focus	<ul style="list-style-type: none"> • Identifies and manages risk as appropriate and escalates as necessary • Recognises how own work impacts on others • Is flexible to changing priorities • Knows how own work contributes to goals and plans
Results Orientation	<ul style="list-style-type: none"> • Prioritises workload effectively and negotiates deadlines where appropriate • Pays attention to detail to ensure quality results • Clarifies expectations and instructions from manager/supervisor and seeks assistance as required • Ensures progress is communicated with manager/supervisor • Reorganises work when priorities change
Service Delivery Excellence	<ul style="list-style-type: none"> • Identifies and delivers high quality internal and external customer service. • Participates in a culture of financial responsibility, accountability and awareness • Adheres to performance requirements to achieve work outcomes. • Effectively manages their own performance positively contributing to team performance • Seeks guidance/advice from others where
Relationship Management	<ul style="list-style-type: none"> • Works cooperatively with others to achieve work outcomes • Seeks ways to resolve conflict and escalates when appropriate • Shares information and knowledge as appropriate • Actively seeks relevant information and views from others • Listens attentively and communicates clearly
Professional approach and drive	<ul style="list-style-type: none"> • Maintains professionalism and confidentiality when dealing with sensitive issues • Appropriately expresses own views and is respectful of the views of others • Identifies risks and takes appropriate action • Pro-actively seeks to develop skills and knowledge • Receptive to feedback and uses to improve performance

Acknowledged by
occupant

/ /

(Print name)

(Signature)

Acknowledged by line
manager

/ /

(Print name)

(Signature & title)

