

Job and Person Specification

Title of Role: Personal Estates Officer

Remuneration Level: ASO2

Business Unit: Public Trustee

Type of Appointment:

Division: Customer Service

Position Number:

Job and Person Specification Approval

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DELEGATE

Primary Purpose

- Provide a personal administrative service to individual clients for protected and power of attorney estates under the incumbent's control and provide advice/ensure clients' needs are satisfied within the provisions of relevant Acts, Regulations and departmental procedures.

Reporting Relationships

- The Personal Estates Officer reports to a Team Leader (AS06) within the Personal Estates Branch.

Key Relationships/Interactions

- The Personal Estates Officer will maintain good working relationships with the customer and any person involved with the customers wellbeing, including Liaison persons, Aged Care Providers, Guardians.

Key Challenges

- The Personal Estates Officer will ensure they provide excellent customer service in accordance with the service standards of Public Trustee
- To ensure all aspects associated with estate administration are carried out in a professional and efficient manner.

Special Conditions

- May be required to undertake alternative duties at the same classification level within the Public Trustee to meet operational needs.
- Employees may be required to undertake duties exclusively in any one of the following capacities:
 - Involved with the general administration of personal estates;
 - Involved with the setting up of new estates; or
 - Involved with relieving the duties of other officers.
- Some out of hours work may be required
- 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 that becomes available as a result of employment in the Attorney-General's Department.

AGD Conditions

- Participation in annual 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 Personal Estates Officer is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Maintenance Function	<ul style="list-style-type: none"> Ensure the effective organisation and administration of estates and trusts under the officer's control by: <ul style="list-style-type: none"> Liaising with beneficiaries, clients and client representatives. Preparing accurate financial statements and reports for the Public Trustee, SACAT and beneficiaries. Administering or dispersing assets according to SACAT Administration Orders, instructions of clients or according to the relevant legislation and complying with Office policies and procedures. Ensure that financial accounts and taxation returns for individual clients are accurate by authorising and validating invoices and data input and providing relevant information to other branches. Ensure security of accommodation by:- <ul style="list-style-type: none"> Arranging accommodation for clients. Arranging and maintaining adequate insurance cover for furniture and personal effects. 	<ul style="list-style-type: none"> Customer communication is conducted in accordance with the relevant standards, procedures and TICK values. Complying with relevant Acts, Regulations and Public Trustee delegations, policies, standards and procedures Successful management of competing demands.
Personal Estates Branch Support	<ul style="list-style-type: none"> Contribute in obtaining new business for the office by providing advice during interviews and on other suitable occasions on the range of client products and services available. Contribute to the smooth operation of the office by exercising delegated authority from the Public Trustee. 	<ul style="list-style-type: none"> Being flexible and adaptive to meet organisational needs. Ensure Public Trustee standards and procedures are adhered to. Ensure accuracy of data and information. Knowledge and information sharing of PT work practices.
Compliance	<ul style="list-style-type: none"> Responsible and accountable for adhering to the requirements of the WHS Act 2012; relevant WHS Regulations 2012; the Equal Opportunity Act 1984; the PS Act 2009; the Code of Ethics for Public Sector employees; the principles of diversity; and the Department's policies and procedures; Keep accurate and complete records of business activities in accordance with the State Records Act 1997. 	<ul style="list-style-type: none"> Active participation and contribution in responsible and safe work practices. Abides by the Acts, Regulations, Policies and Procedures relevant to employees of the Department; Documents and correspondence 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. • Ability to act with tact, sound judgement, discretion and empathy in conflict situations and in dealing with all persons associated with an estate, to negotiate successful outcomes. • Ability to acquire case management and effective time management techniques. • Ability to work with minimal supervision. • Ability to be accurate and thorough. • Skill with numerical calculations. • A commitment to the principles of Service Excellence. • Some experience in interviewing people to gain information and provide advice • Experience in the use of word processing software packages. • Knowledge of the principles and practice of WHS, Equal Opportunity, the PS Act Employee conduct standards and diversity appropriate to the requirements of the role.
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. • Ability to acquire knowledge of Public Trustee Office procedures and instructions. • Ability to acquire knowledge of the legislation relevant to the Public Trustee Office. • Ability to acquire knowledge of a range of products and services offered by the Public Trustee Office. • Some knowledge of social security and other health/welfare support agencies. • Appropriate post-secondary qualifications.

Behavioural Capabilities

Descriptors below detail the behavioural capabilities required for performance in the Personal Estates 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 (Foundational)	Recognises how own work impacts on others Knows how own work contributes to goals and plans Is flexible to changing priorities Contributes to business planning
Results Orientation (Foundational)	Reorganises work when priorities change Delivers results by agreed timeframes Follows due process to achieve outcomes Actively contributes to continuous improvement
Service Delivery Excellence (Operational)	Contributes to a culture of financial responsibility, accountability and awareness Identifies and delivers high quality internal and external customer service Translates performance requirements into achievable outcomes Effectively manages their own performance, managing (or influencing) the wider team performance
Relationship Management (Foundational)	Seeks ways to resolve conflict and escalates when appropriate Actively seeks relevant information and views from others Shares information and knowledge seeking approval where necessary Is aware of the situation and audience in work environment
Professional approach and drive (Foundational)	Identifies risks and takes appropriate action Contributes to a culture of respect and high ethical standards Accepts change constructively Pro-actively seeks to develop skills and knowledge

Acknowledged by
occupant

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(Print name)

(Signature)

Acknowledged by line
manager

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(Print name)

(Signature & title)

