

Job and Person Specification

Title of Role: Estate Services Officer

Remuneration Level: ASO3

Business Unit: Public Trustee

Type of Appointment: Term

Division: Customer Services

Position Number:

Job and Person Specification Approval

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Primary Purpose

The Estate Services Officer provides a personal administrative service to individual clients for deceased estates and trusts under the incumbent's control. Liaise with internal and external service providers for legal, taxation and real estate transactions. Ensure acceptable rates of return on estate investments by regular investment strategy review and arranging for the sale and/or purchase of investments. Ensure that beneficiaries and client needs are satisfied within the provisions of relevant Acts, Regulations and office standards and procedures.

Reporting Relationships

- The Estate Services Officer reports to a Team Leader (ASO6).

Key Relationships/Interactions

- PT Panel Agents, Valuers and Conveyancers, PT Panel Property Managers and Property Inspectors
- Local, interstate and overseas legal service providers including the Crown Solicitor
- Government Offices including the Probate Registry, Coroner's Office and Police
- Local, interstate and overseas businesses, asset holders and financial institutions

Key Challenges

- Managing a high volume case load within agreed timeframes
- Communicating and consulting regularly with clients and stakeholders
- Dealing with conflict situations and with challenging customers
- Working within a legislative framework

Special Conditions

- May be required to work in any of the Customer Services branches.
- Employees will provide the highest standards of customer service to clients 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 Estate Services Officer 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 under the officer's control	Estates are completed within agreed timeframes or annual reviews are conducted within agreed timeframes
	Interviewing beneficiaries and clients to obtain information and arranging follow-up interviews to agree to the administration process.	Customer communications and 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.
	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.
Preparation of Wills and Powers of Attorney	Providing will preparation and power of attorney advice and document preparation.	Wills and Powers of Attorney effectively meet client needs
	Taking instructions and preparing will and power of attorney documents as required	Documents are prepared in accordance with relevant standards, procedures and legislation.



Office Support	Contribute to the smooth operation of the office	Operating up to but not exceeding delegated authority from the Public Trustee.
Management of Estate Liabilities	Reviews and arranges for the payment all estate liabilities.	Liabilities paid in ranking order on time and in accordance with the relevant standards, procedures and legislation
Management of Estate Assets	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 beneficiaries regarding the purchase or disposal of estate assets
	Arranging for the purchase of assets at an appropriate price.	Relevant estate assets are purchased in accordance with the relevant standards, procedures and legislation; Communicates and/or confers with beneficiaries regarding the purchase or disposal of estate assets
	Arranging the renting of properties, and instructing and advising agents on rental conditions and prices and property maintenance.	Relevant properties are rented and maintained in accordance with the relevant standards and procedures.
	Arranging and maintaining insurance cover and property inspections.	All relevant assets are insured and where required are added to the property inspection list.
Management of Trust Investments	Regularly reviewing investment portfolios and strategies.	All trust investments are reviewed at least once annually
	Liaising with clients and Investment Services Branch.	Clients are informed or consulted regarding the trust investment strategy in accordance with standards and procedures.
	Arranging for the sale of small parcels investments to meet client needs.	Client instructions are assessed and processed according with standards and procedures
Operational Efficiencies	Contribute to the operational efficiency of wills, trust or estate administration	Fully complies with the relevant acts, regulations and standards and procedures; and conducts preliminary investigations into possible legal issues for the attention of the Manager, Legal Services.

Business Promotion	Contribute in obtaining new business for the office	Provides advice during interviews and on other suitable occasions on the range of client products and services available.
Compliance	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.	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;
	Keep accurate and complete records of business activities and complies with the State Records Act 1997.	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. Proven ability to manage conflict situations, to be tactful, discrete and empathetic and to negotiate successful outcomes when dealing with: beneficiaries, the family of deceased and other persons associated with an estate, trust or potential new business. Ability to prepare financial statements. Ability to communicate effectively and write well-structured letters and reports. Ability to be accurate and thorough. Ability to work with minimal supervision Experience at interviewing people to gain information and provide advice. Ability to acquire case management and effective time management techniques Ability to quickly acquire knowledge of the legislation relevant to the Public Trustee Office. Experience in the use of word processing and other office support software packages. Knowledge of the principles and practice of WHS, Equal Opportunity, the PS Act 2009, employee conduct standards and diversity appropriate to the requirements of the role. Some knowledge of the range of products and services offered by the Public Trustee Office.
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. 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 (Foundational)	<ul style="list-style-type: none"> • Identifies risks within own work practices • Recognises how own work impacts on others • Is flexible to changing priorities • Knows how own work contributes to goals and plans
Results Orientation (Foundational)	<ul style="list-style-type: none"> • Delivers results by agreed timeframes • 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
Service Delivery Excellence (Operational)	<ul style="list-style-type: none"> • Effectively manages their own performance, managing(or influencing) the wider team performance • Identifies and delivers high quality internal and external customer service • Contributes to a culture of financial responsibility, accountability and awareness • Translates performance requirements into achievable outcomes.
Relationship Management (Operational)	<ul style="list-style-type: none"> • Effectively manages conflict and escalates when appropriate • Shares information and knowledge as appropriate • Negotiates as necessary to achieve outcomes • Actively listens and communicates clearly
Professional approach and drive (Foundational)	<ul style="list-style-type: none"> • Appropriately expresses own views and is respectful of the views of others • Identifies risks and takes appropriate action • Maintains strict confidentiality of information • Receptive to feedback and uses to improve performance

Acknowledged by
occupant

/ /

(Print name)

(Signature)

Acknowledged by line
manager

/ /

(Print name)

(Signature & title)

