

Job and Person Specification

Title of Role: Estate Services Officer

Remuneration Level: ASO 4

Business Unit: Public Trustee

Type of Appointment: Ongoing

Division: Customer Services

Position Number:

Job and Person Specification Approval

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DELEGATE

Primary Purpose

Provide a personal administrative service to individual customers for complex deceased, trusts or protected and power of attorney estates under the incumbent's control, including the provision of advice and liaising on real estate sales. 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 customer needs are satisfied within the provisions of relevant Acts, Regulations and office procedures.

Reporting Relationships

- The Estate Services Officer reports a Team Leaders (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 complex case load within agreed timeframes
- Communicating and consulting regularly with customers and stakeholders
- Dealing with conflict situations and with challenging customers
- Working within a legislative framework
- Contributing to branch operational efficiencies

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 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 ASO4 is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Administration of Estates and Trusts	Ensure the effective planning, organisation and administration of complex estates and trusts under the officer's control	Estates are taken in and managed within agreed timeframes 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 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.
	Reviewing the validity and financial accuracy of statements prepared by other officers	Statement checked within agreed timeframes and any technical training needs are identified.
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 will or trust and 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 will or trust and 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 customers and Investment Services Branch.	Customers 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 customer needs.	Customer 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.
	Contribute to the enhancement of the competency of junior staff	Assisting with on the job training and advising on safe and efficient work practices
Business Promotion	Contribute in obtaining new business for the office	Provides advice during interviews and on other suitable occasions on the range of customer 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 with tact and discretion and to negotiate successful outcomes, using well-reasoned language, delivered in a confident and persuasive manner. • Proven ability 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, trusts or potential new business. • Possess case management and effective time management techniques. • Ability to work independently with minimal supervision. • Ability to be meticulous, accurate and thorough. • High level of competence with numerical calculations and preparation of financial statements. • Ability to quickly acquire knowledge of the legislation relevant to the Public Trustee Office. • Proven ability to write well-structured letters and reports. • Experience in either the administration of case work or financial accounting and reporting. • Experience with either: the management of complex financial, property and business assets or the accounting for complex financial, property and business assets • Some exposure to a computerised accounting system. • Experience in working within a legislative framework directly applicable to the area of work. • Knowledge of the range of products and services offered by the Public Trustee Office. • 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.
Technical Expertise (Desirable)	<ul style="list-style-type: none"> • Ability to work in a team, provide support and effectively transfer knowledge to co-workers at all levels. • 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 (Operational)	<ul style="list-style-type: none"> • Identifies and manages risk as appropriate and escalates as necessary • Communicates plans in practical terms to others • Contributes to the drive for change and innovation • Adapts quickly to changing and emerging priorities
Results Orientation (Operational)	<ul style="list-style-type: none"> • Critically evaluates issues and ensures solutions are practical and achievable • Takes responsibility for the delivery of quality and timely results • Prioritises workload effectively and negotiates deadlines where appropriate • Measures performance and acts on opportunities for continuous improvement
Service Delivery Excellence (Operational)	<ul style="list-style-type: none"> • Identifies and delivers high quality internal and external customer service • Utilises available internal and external resources for optimal outcomes. • Contributes to a culture of financial responsibility, accountability and awareness • Effectively manages their own performance, managing(or influencing) the wider team performance
Relationship Management (Operational)	<ul style="list-style-type: none"> • Develops effective working relationships and internal networks • Effectively manages conflict and escalates when appropriate • Shares information and knowledge as appropriate • Takes into account the situation and audience • Negotiates as necessary to achieve outcomes
Professional approach and drive (Operational)	<ul style="list-style-type: none"> • Maintains professionalism and confidentiality when dealing with sensitive issues • Constructively expresses own views and respects the views of others • Is aware of risks and makes decisions accordingly • Seeks feedback and reviews own performance

Acknowledged by
occupant

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(Print name)

(Signature)

Acknowledged by line
manager

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(Print name)

(Signature & title)

