

# Job and Person Specification

**Title of Role:** Personal Estates Officer

**Remuneration Level:** ASO5

**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

The Personal Estates Branch contributes to strategic business operations and provides high quality financial administration, estate management, investment and legal services to customers who are subject to Administration Orders from the South Australia Civil and Administrative Tribunal (SACAT); or in cases where the Public Trustee also acts as their Attorney and/or as Manager, appointed by the Supreme Court.

The Personal Estates Officer is accountable to the Team Leader for the provision of:

- High quality financial administration and estate management to customers who are subject to Administration Orders from the SACAT; or in cases where the Public Trustee also acts as their Attorney or as Manager by order of the Courts;
- Investment and legal services to customers with guidance; and
- High caring, expert and technical advice, consultancy and advisory service to customers and the community.

The Personal Estates Officer will contribute to the Customer Services Division's strategic business direction through reviews of legislation, policy, plans and work practices.

## Reporting Relationships

- Team Leader

## Key Relationships/Interactions

- Executive & Senior management
- Other PT Branches
- Customers and community groups
- Key stakeholders (State and Federal government departments, courts, lawyers, accountants etc.)

## Key Challenges

- Managing a complex case load within agreed timeframes
- Communicating and consulting regularly with customers and stakeholders
- Providing technical estate or PT business advice to a wide range of customers
- Dealing with conflict situations and with challenging customers
- Working within a legislative framework
- Contributing to branch operational efficiencies by mentoring and by identifying and providing



training on a range of branch specific topics

## Special Conditions

- Some out of hours work and occasional intrastate and/or interstate travel may be required.
- May be required to undertake alternative duties within Public Trustee at the same classification level to meet operational needs.
- 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.
- An individual recommended for appointment/employment to a position of trust in Public Trustee will be subject to a satisfactory criminal history and background screening check being conducted in accordance with Employment Screening (Criminal History and Background Screening Check) Policy. Disclosure of any pending charges is also mandatory. Previous criminal conviction or pending charges will not necessarily preclude employment.

## AGD Conditions

- Participation in regular 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), relevant legislation and AGD policies and procedures; and
- Actively manage and meet the requirements of managing occupational health and safety in the workplace

## Flexible Working Arrangement Options

The South Australian public sector promotes diversity and flexible ways of working including part-time. You are encouraged to discuss the flexible working arrangements for this role.

## 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
<b>Administration and financial management of estates</b>	<ul style="list-style-type: none"> <li>• Ensure the timely and effective planning, organisation and administration of estates.</li> <li>• Providing a high standard of customer service.</li> <li>• Prudently managing all financial matters and assets. (eg managing complex issues, including partnerships, overseas investments/assets or extensive share portfolios, and/or real estate, furniture and effects; addressing excess draw down of funds by customers and/or negotiation and re-negotiation of budgets).</li> <li>• With guidance, manage investment and legal aspects of estates.</li> <li>• Administering or dispersing assets according to Court Orders, SACAT Administration Orders, instructions of customers or according to the relevant legislation and Office policies and procedures.</li> <li>• Managing difficult customer behaviour, or contentious relationship issues or cases.</li> <li>• Reporting to and attending to the SACAT and other court hearings as required.</li> <li>• Conducting thorough investigations of highly complex estates and/or prior financial management.</li> <li>• Managing the timely completion of the administration of an estate at the death of the customer or revocation of Public Trustee's appointment as administrator, manager or attorney.</li> <li>• Managing and conducting a program of review of all estates to ensure compliance with all financial regulations, Acts and Public Trustee standards and procedures to mitigate risk.</li> <li>• Take part in Public Trustee's Customer Visitation Program and other support duties as directed by the Team Leader.</li> <li>• Undertake annual reviews of individual customer estates as required.</li> </ul>	<ul style="list-style-type: none"> <li>• Adheres to the Acts, Regulations, Policies, Procedures and delegations.</li> <li>• Controls are operating correctly and changes are recommended as necessary</li> <li>• Risks are managed</li> <li>• Performance is effectively measured, and customer satisfaction is improved</li> <li>• Work practices and instructions are up to date and accurately describe processes</li> </ul>

<b>Customer Service</b>	<ul style="list-style-type: none"> <li>• Contribute to the Branch and Customer Services Division's strategic business.</li> <li>• Reviewing and advising on improvements to established Departmental and Branch policies, business plans, practices and procedures and relevant Acts and Regulations.</li> <li>• Promoting the services of the Division/Public Trustee and representing the Public Trustee at Marketing and Sales events throughout South Australia.</li> <li>• Ensure the provision of a high caring, customer advisory and consultancy service to customers, stakeholders and interested parties.</li> <li>• Undertaking high-level consultation and negotiation with a wide range of relevant stakeholders as well as seeking and acting on feedback to improve services.</li> <li>• Providing accurate information on the Public Trustee Act and relevant legislation.</li> <li>• Facilitating dispute resolution and investigating and resolving complaints (face to face or by letter).</li> <li>• Exercising delegations from the Public Trustee;</li> <li>• Undertaking operational risk management assessments.</li> <li>• Preparing high level written reports and responses on behalf of the Public Trustee.</li> <li>• Assisting with the identification of training needs and the provision of on-the-job training, coaching and mentoring of lower classified officers.</li> <li>• Leading or participating in project work related to continuous improvement for the branch.</li> </ul>	<ul style="list-style-type: none"> <li>• Adheres to the Acts, Regulations, Policies and Procedures.</li> <li>• Mentors and coaches lower classified officers.</li> <li>• Effective cross team and departmental relations are fostered which facilitate business improvement initiatives and improved customer service delivery</li> <li>• Establishes objectives and milestones for self</li> <li>• Prioritises work activities and adjusts priorities when appropriate</li> <li>• Monitors and constantly works towards improving customer service delivery</li> <li>• Allocates sufficient time for completing own work requirements, avoids scheduling conflicts and develops appropriate timelines and milestones</li> <li>• Prioritises tasks and schedules activities to avoid conflicting deadlines</li> </ul>
<b>Contribute to Culture</b>	<ul style="list-style-type: none"> <li>• Actively participate and contribute to responsible and safe work practices;</li> <li>• Embrace diversity and cultural differences in the workplace.</li> </ul>	<ul style="list-style-type: none"> <li>• Work practices are safe and Work Health and Safety legislation, policies and procedures are adhered;</li> <li>• Respectful behaviour observed when faced with diversity/differences in opinion.</li> </ul>

## Technical Expertise

### Qualifications, Skills, Knowledge and Experience relevant to the role

<b>Technical Expertise (Essential)</b>	<ul style="list-style-type: none"> <li>• Proven ability to determine priorities, cope with high volumes of work, plan and organise workloads, set targets, meet deadlines and achieve high standard results.</li> <li>• Proven ability to communicate with a wide range of people, verbally and in writing, including the preparation of reports and letters on behalf of senior management.</li> <li>• Proven ability to exercise sound judgement in decision making and to act with tact, discretion and empathy when dealing with all persons.</li> <li>• Proven ability to work independently and be meticulous, accurate and thorough.</li> <li>• High level of competence with numerical calculations.</li> <li>• Proven ability to work as part of a team and support others.</li> <li>• Experience in the delivery of the highest standards of customer service.</li> <li>• Experience in the administration and reporting on complex financial matters or similar.</li> <li>• Experience with interpreting and working with legislation.</li> <li>• Experience in interviewing people to gain information and providing advice to customers, carers and/or support agency personnel.</li> <li>• Experience in researching and investigating, analysing and evaluating complex matters.</li> <li>• Knowledge or ability to quickly gain the legislative base of estate administration.</li> <li>• Understanding or ability to gain an understanding of Real Estate, Taxation law, superannuation and Centrelink provisions.</li> </ul>
<b>Technical Expertise (Desirable)</b>	<ul style="list-style-type: none"> <li>• Relevant post-secondary education.</li> <li>• Experience in working with customers who have a mental incapacity.</li> <li>• Experience in the development, implementation and review of administrative procedures.</li> <li>• Knowledge of Trustee legislation including the Guardianship and Administration Act 1993, the Aged and Infirm Persons' Act 1940, the Trustee Act 1936 and the Public Trustee Act 1995.</li> </ul>

## Behavioural Capabilities

The AGD Performance Matrix describes the behaviours expected of AGD employees across various levels in the Department.

Descriptors below detail the behavioural capabilities required for performance in the Personal Estates Officer role. KEY behaviours for this role are listed with the critical behaviours highlighted in **bold**.

This broader group of behaviours are applicable to your ongoing success in the role.

	Strategic Focus	Results Orientation	Service Delivery Excellence	Relationship Management	Professional Approach and Drive
<b>Strategic</b>	Shapes Strategic Thinking and Change	Achieves Organisational Results	Drives Business Excellence	Forges Relationships and Engages Others	Exemplifies Personal Drive and Professionalism
<b>Tactical</b>	Promotes Strategic Thinking and Change	<b>Achieves Team Results</b>	Delivers Business Excellence	Establish Relationships and Engages Others	Models Personal Drive and Professionalism
<b>Operational</b>	<b>Supports Strategic Direction</b>	Achieves and Monitors Own Results	<b>Supports Service Delivery Excellence</b>	<b>Fosters Working Relationships</b>	<b>Supports Personal Drive and Professionalism</b>
<b>Foundational</b>	Understands the Strategic Direction	Achieves Individual Results	Contributes to Service Delivery Excellence	Maintains Working Relationships	Demonstrates Personal Drive and Professionalism

Category and level	Behaviours
<b>Strategic Focus Operational</b>	<ul style="list-style-type: none"> <li>Communicates plans in practical terms to others</li> <li><b>Identifies and manages risk as appropriate and escalates as necessary</b></li> <li>Contributes to the drive for change and innovation</li> <li>Adapts quickly to changing and emerging priorities</li> </ul>
<b>Results Orientation Tactical</b>	<ul style="list-style-type: none"> <li>Provides clear direction on how to achieve outcomes</li> <li><b>Confidently makes decisions showing good judgement</b></li> <li>Critically evaluates the problem in its entirety before identifying and implementing best possible solution</li> <li>Effectively prioritises and re-negotiates tasks as needed</li> </ul>
<b>Service Delivery Excellence Operational</b>	<ul style="list-style-type: none"> <li>Uses capability and expertise of the workgroup to achieve outcomes</li> <li>Identifies and delivers high quality internal and external customer service</li> <li>Utilises available internal and external resources for optimal outcomes.</li> <li><b>Effectively manages their own performance, managing (or influencing) the wider team performance</b></li> </ul>
<b>Relationship Management Operational</b>	<ul style="list-style-type: none"> <li>Effectively manages conflict and escalates when appropriate</li> <li>Develops effective working relationships and internal networks</li> <li><b>Shares information and knowledge as appropriate</b></li> <li>Negotiates as necessary to achieve outcomes</li> <li>Actively listens and communicates clearly</li> </ul>
<b>Professional approach and drive Operational</b>	<ul style="list-style-type: none"> <li>Promotes a culture of respect and high ethical standards</li> <li><b>Maintains professionalism and confidentiality when dealing with sensitive issues</b></li> <li>Is aware of risks and makes decisions accordingly</li> <li>Adapts effectively to change</li> <li>Seeks feedback and reviews own performance</li> </ul>

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