

Job and Person Specification

Title of Role: Estate Services Officer

Remuneration Level: ASO5

Business Unit: Public Trustee

Type of Appointment: Ongoing

Division: Customer Services

PT0105, PT0359, PT0360,
Position Number: PT0361, PT0362, PT0363,
PT0364, PT0365

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. Ensures acceptable rates of return on estate investments by regular investment strategy review and arranging for the sale and/or purchase of investments. Ensures that beneficiaries' and customers' needs are satisfied within the provisions of relevant Acts, Regulations and office procedures.
- Contributing to the Branch and Customer Services Division's strategic business direction, reviews of policy and work practices.
- Assists with the mentoring and coaching of lower classified officers

Reporting Relationships

- The Estate Services Officer ASO5 reports to a Team Leader (ASO6).

Key Relationships/Interactions

- Works collaboratively with other staff in the Branch and across the Public Trustee.
- PT Panel Agents, Valuers and Conveyancers, PT Panel Property Managers and Property Inspectors
- Local, interstate and overseas legal service providers including the Crown Solicitor
- State and Federal Government Departments including the Probate Registry, Coroner's Office and Police
- Local, interstate and overseas businesses, asset holders, financial institutions and other Professionals (including researchers, accountants etc) in the Private Sectors

Key Challenges

- Managing a complex case load within agreed timeframes
- Communicating and consulting regularly with customers and stakeholders
- Providing technical estate, trust 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

- 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 is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Technical Support	Ensures the provision of professional consultancy and advisory services to a wide range of customers (internally to Executive, Management and Staff; and externally to beneficiaries, customers and their representatives, State and Federal Government Departments, the Legal Professional, Accountants and the Community)	Provides accurate and authoritative/technical information on estate and trust administration, Departmental Policies and Procedures and relevant Acts and Regulations.
Business Development	Understanding the Public Trustee's business well and encouraging and promoting the services of the Public Trustee.	Conducts or assists with promotional talks, seminars and business meetings.
	Contribute in obtaining new business for the Public Trustee	Provides advice during interviews and on other suitable occasions on the range of customer products and services available.
Office Support	Contribute to the smooth operation of the office	Operating up to but not exceeding delegated authority from the Public Trustee.
Administration of Estates and Trusts	Ensure the effective management, 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
		Conducts Interviews to obtain information and confirm 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 for trusts are prepared at least 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.	Clear instructions are issued to relevant service providers (including sale agents, valuers, conveyancers, solicitors, probate, genealogy, assets management and accounts section, taxation services, legal etc.) in a timely manner to meet established timelines.
Management of Estate Assets and Liabilities	Reviewing the validity and financial accuracy of statements prepared by other officers	Statement checked within agreed timeframes and any technical training needs are identified.
	Conducts regular risk assessment of estate assets/funds	Assets and funds are prudently invested to maximise income and capital growth.
	Arranging for the sale or transfer of assets and arranging for the purchase of assets at an appropriate price.	Relevant estate assets are collected, transferred, sold or 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
	Real Estate assets are managed and maintained.	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.
		All relevant assets are insured and where required are added to the property inspection list.



	Reviews and arranges for the payment all estate liabilities.	Liabilities are assessed for payment and paid in ranking order on time and in accordance with the relevant standards, procedures and legislation
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 relevant standards and procedures.
	Arranging for the sale of small parcels investments to meet customer needs.	Customer instructions are assessed and processed within agreed timeframes and in accordance with relevant standards and procedures
Operational Efficiencies	Contribute to the operational efficiency of wills, trust or estate administration	Fully complies with the relevant acts, regulations and policies, standards and procedures; and conducts preliminary investigations into possible legal issues for the attention of the Manager, Legal Services.
	Conducts internal audits and checks team work and work of specialist teams within the branch	Checks for compliance and makes recommendations on non-compliant issues.
	Conducts preliminary investigations into possible breaches of legislation or other legal issues on behalf of the Branch Manager or Manager Legal Services.	Prepares draft reports or brings issues to the attention of the relevant Manager in a timely manner
	Contributes to the enhancement of the competency of junior staff	Identifies and assists with on the job and other training and advises on safe and efficient work practices including case management.
	Contribute to the operational efficiency of all branch activities	Mediates and assists with complaints resolution and uses results to make recommendations to improve customer service.
		Leads or participates in continuous improvement projects for the Branch including the review of relevant Acts, regulations, policies, standards and procedures.



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, documents and correspondence are maintained to internal standards and procedures and as required by the <i>State Records Act 1997</i>



Technical Expertise

Qualifications, Skills, Knowledge and Experience relevant to the role

Technical Expertise (Essential)	<ul style="list-style-type: none"> • Proven ability to communicate with a wide range of people, verbally and in writing, including interviewing and the preparation of reports and letters on behalf of senior management • Proven ability to analyse, research and solve problems and effectively manage conflict situations. • Proven ability to act with tact, sound judgement, discretion and empathy when dealing with all persons. • Proven ability to work independently with minimal supervision and be meticulous, accurate and thorough, meet deadlines and achieve a high standard of results. • High level of competence with numerical calculations and preparation of financial statements • Ability to work in a team and support team members through mentoring, coaching and on the job training. • Experience in either the administration of complex estates, or financial accounting and reporting of a complex nature in a customer service environment. • Exposure to a computerised accounting system. • Experience in researching, investigating, analysing and evaluating complex financial/and or legal matters/or social issues • Sound knowledge of and the ability to apply the principles of file management. • A sound understanding of the Public Trustee Act 1995, Administration and Probate Act 1919, and Trustee Act 1936. • Knowledge of the principles and practice of WHS, Equal Opportunity, the Public Sector Act Employee conduct standards and diversity appropriate to the requirements of the position.
Technical Expertise (Desirable)	<ul style="list-style-type: none"> • A sound knowledge of the range of products and services offered by the Public Trustee Office. • Knowledge of the legislation relevant to the Public Trustee Office. • Relevant post-secondary qualification.

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"> Communicates plans in practical terms to others Identifies and manages risk as appropriate and escalates as necessary Contributes to the drive for change and innovation Adapts quickly to changing and emerging priorities Ensures work goals are linked to the bigger picture
Results Orientation	<ul style="list-style-type: none"> Develops plans with clear outcomes and supports others to achieve these Takes responsibility for the delivery of quality and timely results Critically evaluates issues and ensures solutions are practical and achievable Prioritises workload effectively and negotiates deadlines where appropriate Measures performance and acts on opportunities for continuous improvement
Service Delivery Excellence	<ul style="list-style-type: none"> Uses capability and expertise of the workgroup to achieve outcomes Identifies and delivers high quality internal and external customer service Utilises available internal and external resources for optimal outcomes. Promotes a culture of financial responsibility, accountability and awareness Effectively manages their own performance, managing (or influencing) the wider team performance
Relationship Management	<ul style="list-style-type: none"> Effectively identifies, manages and resolves conflict Develops effective working relationships and internal networks Shares information and knowledge as appropriate Negotiates as necessary to achieve outcomes Actively listens and communicates clearly
Professional approach and drive	<ul style="list-style-type: none"> Promotes a culture of respect and high ethical standards Maintains professionalism and confidentiality when dealing with sensitive issues Identifies and considers risk in decision making Adapts effectively to change Seeks feedback and reviews own performance Ensures a focus on wellbeing for self and others and raises concerns where necessary

Acknowledged by
occupant

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(Print name)

(Signature)

Acknowledged by
line manager

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(Print name)

(Signature & title)

