



## **Estates & Gifts in Wills Coordinator**

### **Position Description**

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<b>Position Title</b>	Estates & Gifts in Wills Coordinator	Telephone: (02) 9568 0262
<b>Responsible Council</b>	NSW State Council	Facsimile: (02) 9550 9383
<b>Reports to</b>	Gifts in Wills and Estates Manager	
<b>Base Location</b>	State Council Office, Lewisham	
<b>Primary position objective</b>	To ensure the accurate administration of the legacies, gifts and estates bequeathed to the St Vincent de Paul Society. The Estates & Gifts in Wills Coordinator role contributes to the Society's successful Gifts in Wills program. Reporting to the Gifts in Wills and Estates Manager this role is responsible for delivering the efficient processing of estates from notification through to handover to auditors as well as providing donor relation and fundraising support to the Gifts In Wills and Estates team.	

### **St Vincent de Paul Society**

The St Vincent de Paul Society is a member and volunteer based organisation that has been assisting people experiencing disadvantage in NSW for more than 130 years.

The Society was founded by a 20 year old man named Frederic Ozanam in 1833, who with a group of friends, wanted to make a difference to the poverty and disadvantage that he saw around him in post Revolution France. Leading by example and with boundless energy, Frederic started what is now a world-wide movement in just 20 short years. The St Vincent de Paul Society NSW has around 16,000 members and volunteers and 1480 staff. Our local member networks, referred to as Conferences, are present in over 420 communities across NSW.

Our members and volunteers provide assistance to people experiencing disadvantage including food parcels and vouchers, financial assistance, assistance with energy bills and other debt, budget counselling and the provision of other material items such as furniture, clothing and bedding and any other household items. Importantly, our members also provide vital emotional support and referral services as needed.

The St Vincent de Paul Society is a leading provider of community support services and has close to 100 Special Works across the State in the areas of homelessness, mental health, disability, financial counselling, supported accommodation, food provision, refugees and migrants and addiction counselling.

Our work is funded by all levels of government, the generous support we receive from the community and our 250 Retail Shops across NSW.

### **Departmental Overview**

The role of Estates & Gifts in Will Coordinator sits within a well-established fundraising program and reports to the Gifts in Wills and Estates Manager. The Fundraising & Communications (F&C) Department encompasses a range of professional services including fundraising, major gifts, gifts in wills, events, corporate partnerships, communications and marketing and is dedicated to raising the profile, awareness, funds and support for the 'good works' of the Society.

## Duties and Responsibilities

Reporting to the Gifts in Wills and Estates Manager, the Estate & Gifts in Wills Coordinator is responsible for estates management, ensuring a seamless process and the maximisation of income to contribute to St Vincent de Pauls Society's mission.

- Manage and monitor all aspects of bequests and estates that are bequeathed to St Vincent de Paul Society NSW efficiently
- Provide a monthly forecast and actual income reporting to the Gifts in Wills & Estates Manager through the effective management and administration of the estates pipeline;
- To efficiently manage all correspondence with solicitors, executors, accountants, families and other relevant parties regarding estates issues to ensure timely estate distribution;
- In consultation with the Gifts in Wills & Estates Manager and legal team, coordinate the administration and resolution of contested estates to minimise loss of estate income and minimise reputational risk to St Vincent de Paul Society NSW;
- Attend, or ensure a properly briefed representative attends, estate mediations in which St Vincent de Paul Society NSW has an interest as required;
- Perform administrative duties associated with estate management, including highly efficient database management;
- Update acknowledgement mechanisms such as the recognition boards and Gratitude Book
- Complete other duties as related to departmental objectives as requested by the Gifts in Wills and Estates Manager.

## Organisational Relationships

### Internal

- Communicate with the finance and auditing teams for processing of estates and distributions
- Communicate with the Property and Assets team for the efficient resolution of properties that are bequeathed to the Society
- Communicate with the Gifts in Wills & Estates Manager and legal team for advice where required regarding estate, legal and mediation matters.
- Communicate with the Gifts in Wills team, fundraising team and colleagues within the organisation to ensure prompt and personalised acknowledgment of estate income and other contributions from bequest supporters;

### External

- Communicate with the executors, solicitors, accountants, families, auditors and other stakeholders regarding estate issues.
- Communicate with representatives from other not for profit organisations with whom St Vincent de Paul Society NSW has a share in estates matters;

## Essential Criteria

- Highly organised
- Strong record keeping skills
- Excellent communication skills
- Ability to manage the work in a highly ethical and confidential manner
- Ability to provide a high standard of customer/client service, internally and externally.
- Ability to break down problems, assess and interpret options, and use research, experience and judgment to develop sound and timely solutions.
- Ability to improve the effectiveness and efficiency of processes and methods of existing tasks.
- Ability to plan for and deliver a specific outcome within clearly defined time and resource constraints.

**Desirable Criteria**

- Previous estate experience
- Previous legal experience
- Previous gifts in Wills experience
- Member of The Fundraising Institute of Australia

*The St Vincent de Paul Society is an Equal Employment Opportunity Employer.*