

Job and Person Specification

Title of Role: Estate Services Officer

Classification: ASO3

Business Unit: Public Trustee

Division: Customer Services

Job and Person Specification Approval

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Primary Purpose

The Estate Services Officer is responsible for the effective administration of deceased estates or trusts ensuring customers, beneficiaries and stakeholders receive timely, accurate and high-quality estate services. This role contributes to the Public Trustee's commitment to financial stewardship, customer service excellence and community trust by managing estate assets and liabilities, preparing financial statements, liaising with service providers and ensuring compliance with relevant legislation, regulations and internal procedures.

Job Environment

The Estate Services Officer operates within a framework of legislation, policies and procedures that govern the administration of deceased estates, trusts, and investment management. The role requires the application of judgement in navigating legal financial and interpersonal matters and making decisions within delegated authority in an environment that includes competing stakeholder expectations, sensitive family dynamics and legislative constraints.

This role contributes directly to AGD and Public Trustee strategic goals by supporting transparent, lawful and efficient estate administration; ensuring customers and beneficiaries receive their entitlements; and engaging effectively with legal, financial and property professionals. Through high-quality case management and proactive problem-solving, the role helps maintain public confidence and ensures services are delivered in line with government standards for accountability, equity and customer service excellence.

Reporting Relationships

- Reports to a Team Leader within the Estate Services Branch

Key Relationships/Interactions

- Beneficiaries, customers and customer representatives
- External providers assisting in the estate administration process
- Legal service providers (local, interstate, overseas), including the Crown Solicitor.
- Government Offices including the Probate Registry, Coroner's Office and Police.
- Businesses, financial institutions and asset holders relevant to estate administration.

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



AGD Conditions

- Effectively embed AGD People and Leadership Expectations into all actions, activities and work processes
- Participate in bi-annual Performance Development Plan (PDP)
- Proactively seek learning opportunities, including in the timely completion of all mandatory training requirements
- Comply with the Code of Ethics for the South Australian Public Sector, relevant legislation and AGD policies and procedures
- Employment is dependent upon a compliant National Police Certificate that the AGD finds satisfactory.

Diversity

The Attorney-General's Department values workplace diversity and is committed to providing an inclusive work environment where employees feel respected, valued and empowered to be themselves, we are also committed to reconciliation and strongly value First Nation's perspectives in the community and 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. Flexible working arrangement options for this role may include:

- Flexitime
- Part-time
- Job Sharing
- Compressed weeks
- Work from home arrangements

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	<ul style="list-style-type: none"> • Ensure the effective planning, organisation and administration of estates and trusts under the officer's control. • Interviewing beneficiaries and clients to obtain information and arranging follow-up interviews to agree to the administration process. • Consulting with beneficiaries and customers and customers representatives. • Preparing accurate financial statements. • Timely completion of the administration of estates or trusts. • Instructing and providing relevant information to internal and external service providers. 	<ul style="list-style-type: none"> • Estates are completed within agreed timeframes or annual reviews are conducted within agreed timeframes. • Customer communications are conducted in line with the relevant standards and procedures. • All communications are recorded and responded to within agreed timeframes. • All communications are recorded and responded to within agreed timeframes • Instructions are issued to relevant service providers in a timely manner to meet established timelines.
Office Support	<ul style="list-style-type: none"> • Contribute to the smooth operation of the office. 	<ul style="list-style-type: none"> • Operating up to but not exceeding delegated authority from the Public Trustee.



Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Management of Estate Liabilities	<ul style="list-style-type: none"> • Reviews and arranges for the payment all estate liabilities. 	<ul style="list-style-type: none"> • Liabilities paid in ranking order on time and in accordance with the relevant standards, procedures and legislation.
Management of Estate Assets	<ul style="list-style-type: none"> • Arranging for the purchase of assets at an appropriate price. • Arranging the renting of properties, and instructing and advising agents on rental conditions and prices and property maintenance. 	<ul style="list-style-type: none"> • 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. • Relevant estate assets are purchased in accordance with the relevant standards, procedures and legislation. • All relevant assets are insured and where required are added to the property inspection list.
Management of Trust Investments	<ul style="list-style-type: none"> • Regularly reviewing investment portfolios and strategies. • Liaising with clients and Investment Services Branch. • Arranging for the sale of small parcels investments to meet client needs. 	<ul style="list-style-type: none"> • All trust investments are reviewed at least once annually. • Clients are informed or consulted regarding the trust investment strategy in accordance with standards and procedures. • Client instructions are assessed and processed according with standards and procedures.
Operational Efficiencies	<ul style="list-style-type: none"> • Display constructive behaviours in line with AGD's people expectations of self-awareness, building trust, and building teams. • Seek feedback and review personal performance. • Develop effective working relationships, be approachable and work cooperatively with others to achieve outcomes. • Communicate proactively and prioritise workload effectively, asking for guidance and negotiating deadlines where appropriate. • Identify and undertake personal professional development. • Actively participate and contribute to responsible and safe work practices. • Embrace diversity and cultural differences in the workplace. 	<ul style="list-style-type: none"> • Feedback on performance from peers and leaders is positive. • Priorities are effectively communicated and negotiated. • Personal development is undertaken. • Work practices are safe and Work Health and Safety legislation, policies and procedures are adhered. • Respectful behaviour observed when faced with diversity/differences in opinion.
Compliance	<ul style="list-style-type: none"> • Comply with the WHS Act 2012 and WHS Regulations 2012. • Comply with the Equal Opportunity Act 1984. • Comply with the Public Sector Act 2009. • Comply with the Code of Ethics for the South Australian Public Sector. • Apply diversity and inclusion principles. • Comply with departmental policies and procedures. 	<ul style="list-style-type: none"> • Active participation in safe and responsible work practices. • Compliance with all relevant legislation, policies and procedures. • Records filed correctly under the State Records Act 1997.

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
	<ul style="list-style-type: none"> • Maintain accurate business records in accordance with the State Records Act 1997. 	

Capabilities relevant to the role (Qualifications, Skills, Knowledge and Experience)

Essential	<ul style="list-style-type: none"> • Ability to prioritise and manage high workloads, meet deadlines and deliver accurate, high-quality results. • Ability to manage conflict with tact, discretion and empathy, and negotiate effective outcomes when working with beneficiaries, families and other stakeholders. • Ability to prepare accurate financial statements and interpret financial information. • Strong written and verbal communication skills, including preparing clear, well-structured reports and correspondence. • High level of accuracy, attention to detail and thoroughness in all tasks. • Ability to work independently with minimal supervision. • Experience interviewing customers to gather information and provide advice. • Effective case management and time-management capability. • Ability to quickly acquire and apply knowledge of relevant Public Trustee legislation. • Proficiency in word processing and office software systems. • Knowledge of WHS, Equal Opportunity, Public Sector Act obligations, conduct standards and diversity principles. • General knowledge of the range of Public Trustee services and products.
Desirable	<ul style="list-style-type: none"> • Ability to work effectively in a team environment and share knowledge with colleagues. • Knowledge of Public Trustee-related legislation. • Relevant post-secondary qualifications.

Behavioural Capabilities and AGD People Expectations

The AGD Performance Matrix describes the behaviours expected of AGD employees across various levels in the Department. All employees are expected to behave in accordance with the AGD People Expectations of being self-aware, building trust and building teams. Descriptors below detail the behavioural capabilities required for performance in the Estate Services 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
Strategic	Shapes Strategic Thinking and Change	Achieves Organisational Results	Drives Business Excellence	Forges Relationships and Engages Others	Exemplifies Personal Drive and Professionalism
Tactical	Promotes Strategic Thinking and Change	Achieves Team Results	Delivers Business Excellence	Establish Relationships and Engages Others	Models Personal Drive and Professionalism
Operational	Supports Strategic Direction	Achieves and Monitors Own Results	Supports Service Delivery Excellence	Fosters Working Relationships	Supports Personal Drive and Professionalism
Foundational	Understands the Strategic Direction	Achieves Individual Results	Contributes to Service Delivery Excellence	Maintains Working Relationships	Demonstrates Personal Drive and Professionalism



Element	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.
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.

Acknowledged by
occupant

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(Print name)

(Signature)

Acknowledged by line
manager

/ /

(Print name)

(Signature & title)

