

Job and Person Specification

Title of Role: Personal Estates Officer

Classification: ASO3

Business Unit: Public Trustee

Division: Customer Service

Job and Person Specification Approval

...../...../.....

Primary Purpose

The purpose of this role is to provide a personalised financial administrative service to individual customers arising from protected, award, and power of attorney estates under the incumbent's management. This includes ensuring that customers' needs are met in line with the provisions of relevant Acts, Regulations, and internal procedures, including maintenance of customers' investment outcomes through regular strategy reviews and the timely management of investment recommendations. The role also undertakes annual checks of critical estate management processes across all Financial Administration files to verify the accuracy, integrity, and reliability of financial records, including confirmation of financial transactions, fees, and charges.

Job Environment

The Personal Estates Officer contributes to the Public Trustee's strategic objectives by ensuring that estate financial administration is accurate, compliant, and delivered with service excellence. This directly supports whole-of-government goals relating to accountability, protection of vulnerable South Australians, strong financial stewardship, and high-quality public service delivery.

Working within this environment requires the Personal Estates Officer to exercise sound judgement when interpreting legislation, policies, and delegations, often in situations involving vulnerable customers and complex financial or administrative matters. The role involves a moderate to high level of complexity, requiring independent decision-making within defined delegations, and careful navigation of sensitive customer issues, regulatory requirements, and competing priorities.

Reporting Relationships

- Reports to a Team Leader within the Financial Administration Branch

Key Relationships/Interactions

- Customers whose financial administration is under management.
- Liaison persons involved in supporting the customer.
- Aged Care Providers responsible for aspects of the customer's wellbeing.
- Guardians or other authorised representatives engaged in decision-making for the customer.
- Any additional individuals or service providers involved in the customer's overall welfare.

Key Challenges

- The Personal Estates Officer will ensure they provide excellent customer service matching the service standards of Public Trustee
- To ensure all aspects associated with estate financial administration are carried out in a professional and efficient manner

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 Personal Estates Officer is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Maintenance Function	<p>Estate financial administration</p> <ul style="list-style-type: none"> • Interview and liaise with customers or representatives to obtain required information. • Build productive relationships with service providers. • Liaise with customers and their supports on the administration process, communication approach and a budget that meets their needs. • Develop, implement and maintain a Case Management Plan for each customer. • Prepare, negotiate and review annually a budget for each customer. • Identify, record, secure and collect financial assets, and insure assets (including real estate) where appropriate. • Identify, record and arrange timely payment of all customer accounts and liabilities. • Provide accurate and timely taxation information for each customer to the Taxation Services Branch. • Promptly identify matters requiring legal advice or action and refer to Public Trustee legal representatives. • Prepare accurate financial statements for reporting and attend SACAT and other Court hearings as required. • Prepare estate files for transfer to Personal Estates Officers for ongoing administration, including first statements. • Ensure each customer receives their full Centrelink entitlements. 	<ul style="list-style-type: none"> • Customer communication in line with policies, standards and procedures. • Compliance with relevant Acts, Regulations, policies, standards, procedures and delegations. • Competing demands are managed effectively.

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
	<ul style="list-style-type: none"> • Assist in resolving family conflict affecting vulnerable customers' financial management. • Secure income streams and ensure all entitlements to income support are being received. 	
	<p>Asset management</p> <ul style="list-style-type: none"> • Arrange sale or purchase of motor vehicles and specialist equipment. • Purchase furniture at a fair and appropriate price. • Arrange leasing or renting of properties; instruct agents on rental conditions, pricing and property maintenance. • Arrange and maintain appropriate insurance cover 	<ul style="list-style-type: none"> • Follows Procurement standards.
	<p>Investment management</p> <ul style="list-style-type: none"> • Identify existing investments and obtain written instructions from Power of Attorney customers with capacity • Liaise with customers and the Investment Services Branch. • Gather information to determine suitable investment parameters for each customer. • Apply the Public Trustee investment planning model. • Exercise delegated authority or obtain delegate approval for investment strategies. • Arrange sale or purchase of investments. • Exercise delegated authority. 	<ul style="list-style-type: none"> • Annual CIT model completed for each estate in accordance with standards and procedures. • Annual Financial Plan obtained where appropriate • Compliance with Acts, Regulations, Public Trustee policies, procedures, standards and delegations.
<p>Checking Function</p>	<ul style="list-style-type: none"> • Complete the standardised annual statement checklist. • Complete the fees and charges checklist. • Maintain a database of files checked. • Confirm statutory reporting to customers, liaison persons and SACAT. • Confirm correct application of Public Trustee fees, charges and commissions. • Review and adjust cash transaction listings. • Confirm investment portfolio reviews of managed funds are completed. • Review and update asset and liability values. • Review pension and income entitlements. • Review eligibility for utility concessions. • Review personal allowances and maintenance levels. • Conduct budget reviews when required. • Confirm accuracy of accommodation and similar fees. • Verify customer personal information in the database. • Verify the contents of security records. • Confirm real estate check sheets and inspection records are accurate and current. • Review diary records and verify key anniversary dates. • Verify insurance policies and premium payments (house, contents, motor vehicle, private health insurance, SA Ambulance). • Verify will records. • Ensure funds are not unnecessarily overdrawn. • Confirm Legal List entries where required. • Identify non-compliance and ensure remedial action is taken. 	<ul style="list-style-type: none"> • All estates reviewed annually. • Compliance with legislation, policies, procedures, standards and delegations.

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Estate Accounting Support	<ul style="list-style-type: none"> • Support timely finalisation of less complex estates following customer death or revocation of Public Trustee appointment. • Distribute trust funds in accordance with wills or legislation and correctly identify next of kin. • Return assets to customers upon revocation of Public Trustees appointment. • Redeem investments in Standard Investment Strategies. • Prepare financial statements. • Refer estates internally in a timely manner where the administration is to be undertaken by the Public Trustee • 	<ul style="list-style-type: none"> • Adherence to Estate Accounting finalisation procedures.
Personal Estates Branch Support	<ul style="list-style-type: none"> • Provide administrative support to the Branch, including relieving Personal Estates Officers. • Assist with preparing reports and correspondence for the Branch Manager or Team Leaders. • Support the development of junior staff and assist with on-the-job training. • Support smooth branch operations by exercising delegated authority. • Assist in the timely management of customer complaints 	<ul style="list-style-type: none"> • Flexibility and adaptability to organisational needs. • Compliance with Public Trustee policies and procedures. • Accuracy and integrity of recorded information. • Effective sharing of knowledge and work practices.
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. • Maintain accurate business records in accordance with the State Records Act 1997. 	<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.

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

Essential	<ul style="list-style-type: none"> • Ability to prioritise work, manage competing deadlines and maintain accuracy under pressure. • Strong interpersonal and communication skills, with the ability to build and maintain effective working relationships with customers, families, service providers and colleagues. • Ability to manage conflict situations with tact, discretion and empathy in the negotiation of successful outcomes • Ability to apply judgement, identify risks, and escalate matters requiring legal, financial or operational attention. • Sound analytical and problem-solving skills, including the ability to interpret financial information and prepare clear statements and reports. • Demonstrated ability to work independently with minimal supervision and exercise delegated authority responsibly. • High level of attention to detail when managing customer information, assets, accounts, and financial records. • Competence in using computerised systems, databases and standard office software to manage case information and documentation. • Understanding of administrative processes, recordkeeping obligations and the need to maintain confidentiality and professionalism.
Desirable	<ul style="list-style-type: none"> • Knowledge of relevant legislation applicable to the Public Trustee environment (e.g. Guardianship and Administration Act, Powers of Attorney, Trusts, Wills, Probate). • Experience in case management, financial administration or estate management. • Knowledge of Centrelink entitlements, aged-care funding, and community support services. • Understanding of investment principles, property management and procurement processes.

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 ASO3 Personal Estates Officer. 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
Results Orientation — Achieves and Monitors Own Results (Operational)	<ul style="list-style-type: none"> • Takes responsibility for delivering accurate, timely and high-quality results. • Monitors own workload and adjusts to meet required deadlines. • Prioritises effectively and renegotiates deadlines when required. • Evaluates issues logically and identifies practical solutions. • Looks for opportunities to improve processes, accuracy and customer outcomes.
Service Delivery Excellence — Supports Service Delivery Excellence (Operational)	<ul style="list-style-type: none"> • Delivers high-quality services to customers, including vulnerable community members. • Applies financial accountability and uses resources appropriately. • Understands performance requirements and translates them into practical actions. • Manages own performance and supports consistency in team service delivery. • Contributes to a culture of responsibility, service excellence and continuous improvement.
Relationship Management — Fosters Working Relationships (Operational)	<ul style="list-style-type: none"> • Builds and maintains effective and respectful working relationships with customers, families, service providers and colleagues. • Communicates clearly and adjusts communication style to suit the audience. • Consults and seeks input from others when required. • Manages conflict constructively and escalates concerns appropriately. • Shares information appropriately to support coordinated and effective service delivery.
Strategic Focus — Supports Strategic Direction (Operational)	<ul style="list-style-type: none"> • Understands how own work contributes to branch and Public Trustee objectives. • Identifies risks in work practices and escalates where appropriate. • Adapts to changing priorities and contributes to improvement initiatives. • Participates in branch planning discussions and implements agreed actions. • Applies awareness of the broader operational environment when making decisions.

Acknowledged by occupant

/ /

(Print name)

(Signature)

Acknowledged by line manager

/ /

(Print name)

(Signature & title)

