

Job and Person Specification

Title of Role: Estate Services Support Officer

Classification: ASO2

Business Unit: Public Trustee

Division: Customer Services

Job and Person Specification Approval

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Primary Purpose

The Estate Services Support Officer provides administrative and customer-focused support in the management of deceased estates, trusts, and related matters. The role ensures estate activities are completed accurately, efficiently, and in line with legislation, policy requirements, and established service standards. It contributes to timely estate progression and supports positive outcomes for customers, beneficiaries, and stakeholders.

Job Environment

The Estate Services Support Officer operates within a structured legislative, policy and procedural framework that governs the Public Trustee and the broader Attorney-General's Department. This includes interpreting and applying established guidelines while managing routine tasks that occasionally involve moderate complexity and judgement. Decision-making is primarily guided by defined practices, with escalation pathways available for matters that fall outside standard parameters.

This role supports the department's broader strategic goals by providing reliable administrative and customer service functions that enable frontline teams to deliver high-quality services to clients, beneficiaries and members of the public. Through efficient task management, accurate record handling and consistent service delivery, the position helps maintain organisational standards and contributes to the Public Trustee's overall operational effectiveness and reputation.

Reporting Relationships

- Reports to a Team Leader in the Estate Services branch..

Key Relationships/Interactions

- Liaises with Estate Services Officers, Team Leaders and Managers to support effective branch operations.
- Communicates with external stakeholders to ensure accurate and timely exchange of information.
- Engages with beneficiaries, customers and members of the public, providing clear and professional assistance.
- State and Local Government Offices including but not limited to the Registry of Birth Deaths and Marriages, Electoral Roll Commission, Police and Australia Post.

Key Challenges

- To provide a clerical support function to the Estate Services Branch by ensuring telephone messages are accurately recorded and relayed to the appropriate Estate Services Officer
- Assisting a small team to manage conflicting priorities and high-volume caseloads within agreed timeframes.
- Assisting with the regular communication and consultation with customers and stakeholders.
- Dealing with conflict situations and with challenging customers.



AGD Conditions

- Some out of hours work may be required.
- 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.
- Employees may be required to work in any branch of the Customer Services Division.
- Employees will provide the highest standards of customer service to clients at all levels by modelling service excellence that meets customer needs and enhances the organisation's corporate profile.
- Employees are expected to maintain the integrity and security of all information that becomes available as a result of employment in the Attorney-General's Department.
- Effectively embed AGD People and Leadership Expectations into all actions, activities and work processes.
- Participate in bi-annual Performance Development Plan (PDP) discussions.
- Proactively seek learning opportunities, including 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

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

Essential	<ul style="list-style-type: none"> • Experience in the operation of telephone systems • Ability to cope with a high volume of work and prioritise work to meet task deadlines. • Ability to work independently with limited supervision and be meticulous, accurate and thorough. • Ability to communicate effectively both verbally and in writing. • Ability to deal with challenging situations. • Ability and commitment to work effectively both independently and as part of a team. • A demonstrated ability to deliver an effective service to customers, and a commitment to service excellence. • Ability to be accurate, thorough and detail-focused. • Experience using Microsoft Office suite of software. • Knowledge of OHSW, Equal Opportunity, Public Sector Act conduct standards and diversity principles relevant to the role.
Desirable	<ul style="list-style-type: none"> • Ability to work effectively in a team and transfer knowledge to co-workers. • Knowledge of legislation relevant to the Public Trustee Office. • Knowledge of the range of products and services offered by the Public Trustee Office.



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
Clerical & Administrative Support	<ul style="list-style-type: none"> • Contribute to the effective and efficient functioning of the branch by providing high-quality clerical and administrative support. • Deliver effective administrative support by answering telephones, recording messages and managing general queries, while updating telephone lists and maintaining accurate staff-movement records. • Complete document-related tasks including photocopying, typing letters, memos and other documents, and undertaking filing duties such as preparing and transferring files to State Records storage. • Sort and distribute incoming correspondence and files, and manage customer records by opening, amending and closing vendor and customer CRM entries. • Access and clear generic email inboxes daily, open new customer records and prepare standard letters for new estates. • Lodge documents and pay accounts at external agencies and organisations as required. • Liaise with external organisations, as required. • Maintain stationery stores and ensure stock levels meet operational requirements. 	<ul style="list-style-type: none"> • Adheres to Public Trustee Customer Service Charter. • Provision of quality customer service in accordance with Public Trustee policies, standards and procedures. • Successful management of competing demands. • Work is completed within agreed timeframes. • Accuracy of data and correspondence is maintained. • Quality written and verbal communication. • Confidentiality is maintained. • Feedback from internal and external customers is positive.
Customer Service	<ul style="list-style-type: none"> • Providing high quality information to Public Trustee and Estate Services customers. • Referring queries to the customer's assigned officer • Relay information to customers as directed by the customer's officer. 	<ul style="list-style-type: none"> • Appropriate and prompt referring of complex queries. • Work is completed within agreed timeframes. • Accurate and relevant information is provided to customers. • Quality of advice meets expectations. • Prompt resolution of basic queries.
Compliance	<ul style="list-style-type: none"> • Responsible and accountable for adhering to the requirements of the WHS Act 2012, the 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 all departmental policies and procedures. • Keep accurate and complete records of business activities in accordance with the State Records Act 1997. 	<ul style="list-style-type: none"> • Actively participate in and contribute to responsible and safe work practices. • Abide by all Acts, Regulations, Policies and Procedures relevant to employees of the Department. • Ensure documents and correspondence are filed in accordance with the State Records Act 1997.

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. • Knows how own work contributes to goals and plans. • Recognises how own work impacts on others. • Is flexible to changing priorities.
Results Orientation Foundational	<ul style="list-style-type: none"> • Clarifies expectations and instructions from manager/supervisor and seeks assistance as required. • Ensures progress is communicated with manager/supervisor. • Follows due process to achieve outcomes. • Pays attention to detail to ensure quality results. •
Service Delivery Excellence Foundational	<ul style="list-style-type: none"> • Contributes to a culture of financial responsibility, accountability and awareness. • Identifies and delivers high quality internal and external customer service. • Translates performance requirements into achievable outcomes. • Effectively manages their own performance, managing (or influencing) the wider team performance.
Relationship Management Foundational	<ul style="list-style-type: none"> • Seeks ways to resolve conflict and escalates where necessary. • Actively seeks relevant information and views from others. • Shares information and knowledge seeking approval where necessary. • Works cooperatively with others to achieve positive outcomes.
Professional approach and drive Foundational	<ul style="list-style-type: none"> • Contributes to a culture of respect and high ethical standards. • Identifies risks and takes appropriate action. • Maintains strict confidentiality of information. • Accepts change constructively.

Acknowledged by occupant

(Print name)

(Signature)

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Acknowledged by line manager

(Print name)

(Signature & title)

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