

Job and Person Specification

Title of Role: Estate Services Officer

Classification: ASO5

Business Unit: Public Trustee

Division: Customer Services

Job and Person Specification Approval

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

Primary Purpose

The Estate Services Officer is responsible for the effective administration of complex 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 complex framework of legislation, policies and standards governing the administration of deceased estates and trusts, property transactions and investment activities. The role requires the consistent application of legislation, regulations, Public Trustee policies and established work practices while navigating complex situations that often involve sensitive family dynamics, conflict, incomplete information and competing priorities. Decision making regularly involves interpreting legislative requirements, assessing risks, coordinating multiple stakeholders and resolving issues within delegated authority.

This role contributes to the broader objectives of the Public Trustee and the Attorney-General's Department by ensuring the lawful, timely and transparent administration of estates and trusts, supporting customer confidence in government services and promoting high standards of accountability and service delivery. Through effective case management, technical expertise, stakeholder engagement and contributions to policy development and process improvement, the role supports organisational capability, service excellence and continuous improvement across the customer services division.

Reporting Relationships

- Reports To Team Leader within the Estate Services Branch

Key Relationships/Interactions

- Executive & Senior management
- Other Branches of the Public Trustee
- Public Trustee Panel Agents, Valuers and Conveyancers, 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 advice to Public Trustee business units and 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.

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.
- Some out of hours work and occasional intrastate and/or interstate travel may be required.
- May be required to undertake alternative duties within Public Trustee at the same classification level to meet operational needs.

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
Technical Support	<ul style="list-style-type: none"> • Provide professional consultancy and advisory services to internal stakeholders, including Executive, Managers and staff. • Provide expert advice and support to external stakeholders such as beneficiaries, customers and their representatives. • Liaise with State and Federal Government departments in relation to estate, trust and Public Trustee matters. • Provide informed advice to legal practitioners, accountants, financial institutions and other professionals involved in estate or trust administration. • Engage with community stakeholders requiring guidance on estate, trust or Public Trustee processes. 	<ul style="list-style-type: none"> • Provides accurate and authoritative technical information on estate and trust administration, • Departmental Policies and Procedures and relevant Acts and Regulations.
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
Administration of Estates and Trusts	<ul style="list-style-type: none"> • Ensure the effective management, planning, organisation and administration of complex estates and trusts under the officer's control • Preparing accurate financial statements. • Timely completion of the administration of estates or trusts. • Instructing and providing relevant information to internal and external service providers. • 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. 	<ul style="list-style-type: none"> • Estates are taken in, managed and reviewed within agreed timeframes. • Conduct interviews to obtain information and confirm the administration process. • Maintain customer communications in line with standards, procedures and TICK values. • Consult with beneficiaries, customers and their representatives throughout administration. • Record all communications and respond within agreed timeframes. • Prepare accurate financial statements annually for estates and trusts. • Finalise estates and trusts within required timeframes. • Conduct regular risk assessments of estate assets and funds. • Issue clear and timely instructions to service providers, including agents, valuers, conveyancers, solicitors, probate, genealogy, asset management, accounts, taxation services and legal representatives. • Review statements prepared by other officers within agreed timeframes and identify training needs where required. • Ensure assets and funds are prudently invested to maximise income and capital growth.
Management of Estate Assets and Liabilities	<ul style="list-style-type: none"> • Arranging for the sale or transfer of assets and arranging for the purchase of assets at an appropriate price. • Real Estate assets are managed and maintained. 	<ul style="list-style-type: none"> • 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 • 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.
Management of Trust Investments	<ul style="list-style-type: none"> • Regularly reviewing investment portfolios and strategies. • Liaising with customers and Investment Services Branch. • Arranging for the sale of small parcels investments to meet customer needs. 	<ul style="list-style-type: none"> • All trust investments are reviewed at least once annually. • Customers are informed or consulted regarding the trust investment strategy in accordance with relevant standards and procedures. • Customer instructions are assessed and processed within agreed timeframes and in accordance with relevant standards and procedures.
Operational Efficiencies	<ul style="list-style-type: none"> • Contribute to the operational efficiency of wills, trust or estate administration. • Conducts internal audits and checks team work and work of specialist teams within the branch. • Conducts preliminary investigations into possible breaches of legislation or other 	<ul style="list-style-type: none"> • 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. • Checks for compliance and makes recommendations on noncompliant issues.

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
	legal issues on behalf of the Branch Manager or Manager Legal Services. <ul style="list-style-type: none"> • Contributes to the enhancement of the competency of junior staff. • Contribute to the operational efficiency of all branch activities. 	<ul style="list-style-type: none"> • Prepares draft reports or brings issues to the attention of the relevant Manager in a timely manner. • Identifies and assists with on the job and other training and advises on safe and efficient work practices including case management. • 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 <ul style="list-style-type: none"> • 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. • The Department's policies and procedures. 	<ul style="list-style-type: none"> • 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. • Files, documents and correspondence are maintained to internal standards and procedures and as required by the State Records Act 1997.

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

Essential	<ul style="list-style-type: none"> • Strong communication skills, including interviewing, reporting and preparing clear written correspondence for a wide range of audiences. • Ability to analyse, research and resolve problems, including managing conflict effectively. • Capacity to exercise sound judgement, tact, discretion and empathy in all interactions. • Ability to work independently with minimal supervision while maintaining accuracy, thoroughness and meeting deadlines. • High level of numerical competence, including performing calculations and preparing financial statements. • Ability to work collaboratively in a team environment and support others through mentoring, coaching and on-the-job training. • Experience in administering complex estates or undertaking complex financial accounting and reporting within a customer service environment. • Experience using computerised accounting systems. • Experience researching, investigating and evaluating complex financial, legal or social matters. • Sound understanding and application of file management principles. • Working knowledge of relevant estate legislation, including the Public Trustee Act 1995, Administration and Probate Act 1919 and Trustee Act 1936. • Knowledge of WHS, Equal Opportunity, the Public Sector Act, conduct standards and diversity requirements.
Desirable	<ul style="list-style-type: none"> • Knowledge of Public Trustee products and services. • Knowledge of legislation relevant to the Public Trustee Office. • 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 Operational	<ul style="list-style-type: none"> • Identifies and manages risk as appropriate and escalates as necessary. • Communicates plans in practical terms to others. • 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 Tactical	<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 Operational	<ul style="list-style-type: none"> • Effectively manages their own performance, managing (or influencing) the wider team performance. • 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.
Relationship Management Operational	<ul style="list-style-type: none"> • Shares information and knowledge as appropriate. • Effectively identifies, manages and resolves conflict. • Develops effective working relationships and internal networks. • Negotiates as necessary to achieve outcomes. • Actively listens and communicates clearly.
Professional approach and drive Operational	<ul style="list-style-type: none"> • Maintains professionalism and confidentiality when dealing with sensitive issues. • Promotes a culture of respect and high ethical standards • 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

/ /

(Print name)

(Signature)

Acknowledged by line manager

/ /

(Print name)

(Signature & title)

