

Job and Person Specification

Title of Role: Personal Estates Officer **Remuneration Level:** ASO5

Business Unit: Public Trustee **Division:** Customer Services

Job and Person Specification Approval

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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 personal, financial or administrative matters. The role involves a 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

- Executive & Senior management
- Other Branches of the Public Trustee
- 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 stakeholders (State and Federal government departments, courts, lawyers, accountants etc.)



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 Personal Estates Officer is responsible for:

| Key Responsibilities | Specified Duties | Performance Indicator/Measurement |
|---|--|---|
| Administration and financial management of estates | <ul style="list-style-type: none"> • Ensure estates are planned, organised and administered efficiently and within required timeframes. • Provide a consistently high standard of customer service. • Manage all financial matters and assets responsibly, including complex arrangements such as partnerships, overseas investments, large share portfolios, real estate, personal property and customer budget negotiations. • Manage investment and legal aspects of estates with guidance as required. | <ul style="list-style-type: none"> • Adheres to the Acts, Regulations, Policies, Procedures and delegations. • Controls are operating correctly and changes are recommended as necessary • Risks are managed • Performance is effectively measured, and customer satisfaction is improved |

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| | <ul style="list-style-type: none"> • Administer and distribute assets in accordance with Court Orders, SACAT Administration Orders, customer instructions, legislation and Public Trustee policies and procedures. • Manage challenging customer behaviour and resolve sensitive or contentious situations. • Prepare for, report to and attend SACAT and other court hearings as required. • Undertake detailed investigations into complex estates and prior financial management issues. • Manage the finalisation of estates following a customer's death or when the Public Trustee's appointment as administrator, manager or attorney ends. • Conduct reviews of all estates to ensure compliance with legislation, financial regulations and Public Trustee standards, and to support effective risk mitigation. • Complete annual reviews of individual customer estates as required. | <ul style="list-style-type: none"> • Work practices and instructions are up to date and accurately describe processes |
| <p>Customer Service</p> | <ul style="list-style-type: none"> • Contribute to the strategic priorities and business direction of the Branch and the Customer Services Division. • Review and provide advice on improvements to Departmental and Branch policies, business plans, procedures and relevant legislation. • Promote Public Trustee services and represent the organisation at marketing, community and information events across South Australia. • Deliver high-quality customer advisory, consultancy and support services to customers, stakeholders and interested parties. • Undertake high-level consultation and negotiation with a wide range of stakeholders and act on feedback to improve service delivery. • Provide accurate information and guidance on the Public Trustee Act and other relevant legislation. • Facilitate dispute resolution and manage the investigation and resolution of complaints through meetings, discussions or written responses. • Exercise delegations on behalf of the Public Trustee where required. • Conduct operational risk assessments and implement actions to address identified risks. • Prepare high-level written reports, advice and responses on behalf of the Public Trustee. • Identify training needs and provide on-the-job training, coaching and mentoring to less experienced officers. • Lead or participate in branch projects and continuous improvement initiatives. | <ul style="list-style-type: none"> • Adheres to the Acts, Regulations, Policies and Procedures. • Mentors and coaches lower classified officers. • Effective cross team and departmental relations are fostered which facilitate business improvement initiatives and improved customer service delivery • Establishes objectives and milestones for self • Prioritises work activities and adjusts priorities when appropriate • Monitors and constantly works towards improving customer service delivery • Allocates sufficient time for completing own work requirements, avoids scheduling conflicts and develops appropriate timelines and milestones • Prioritises tasks and schedules activities to avoid conflicting deadlines • Customer communication in line with policies, standards and procedures. |

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| Contribute to Culture | <ul style="list-style-type: none"> • Actively participate in maintaining a safe, responsible and compliant workplace. • Demonstrate respect for diversity and support an inclusive and culturally aware work environment. | <ul style="list-style-type: none"> • 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. |
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Technical Expertise

Qualifications, Skills, Knowledge and Experience relevant to the role

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| Technical Expertise (Essential) | <ul style="list-style-type: none"> • Proven ability to determine priorities, cope with high volumes of work, plan and organise workloads, set targets, meet deadlines and achieve high standard results. • Proven ability to communicate with a wide range of people, verbally and in writing, including the preparation of reports and letters on behalf of senior management. • Proven ability to exercise sound judgement in decision making and to act with tact, discretion and empathy when dealing with all persons. • Proven ability to work independently and be meticulous, accurate and thorough. • High level of competence with numerical calculations. • Proven ability to work as part of a team and support others. • Experience in the delivery of the highest standards of customer service. • Experience in the administration and reporting on complex financial matters or similar. • Experience with interpreting and working with legislation. • Experience in interviewing people to gain information and providing advice to customers, carers and/or support agency personnel. • Experience in researching and investigating, analysing and evaluating complex matters. • Knowledge or ability to quickly gain the legislative base of estate administration. • Understanding or ability to gain an understanding of Real Estate, Taxation law, superannuation and Centrelink provisions. |
| Technical Expertise (Desirable) | <ul style="list-style-type: none"> • Relevant post-secondary education. • Experience in working with customers who have a mental incapacity. • Experience in the development, implementation and review of administrative procedures. • Knowledge of Trustee legislation including the Guardianship and Administration Act 1993, the Aged and Infirm Persons' Act 1940, the Trustee Act 1936 and the Public Trustee Act 1995. |

Behavioural Capabilities

The AGD Performance Matrix describes the behaviours expected of AGD employees across various levels in the Department.

Descriptors below detail the behavioural capabilities required for performance in the Personal Estates 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 Relationship | 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 |

| Category and level | Behaviours |
|--|---|
| Strategic Focus Operational | <ul style="list-style-type: none"> Communicates plans in practical terms to others Identifies and manages risk as appropriate and escalates as necessary Contributes to the drive for change and innovation Adapts quickly to changing and emerging priorities |
| Results Orientation Tactical | <ul style="list-style-type: none"> Provides clear direction on how to achieve outcomes Confidently makes decisions showing good judgement Critically evaluates the problem in its entirety before identifying and implementing best possible solution Effectively prioritises and re-negotiates tasks as needed |
| Service Delivery Excellence Operational | <ul style="list-style-type: none"> 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. Effectively manages their own performance, managing (or influencing) the wider team performance |
| Relationship Management Operational | <ul style="list-style-type: none"> Effectively manages conflict and escalates when appropriate Develops effective working relationships and internal networks Shares information and knowledge as appropriate Negotiates as necessary to achieve outcomes Actively listens and communicates clearly |
| Professional approach and drive Operational | <ul style="list-style-type: none"> Promotes a culture of respect and high ethical standards Maintains professionalism and confidentiality when dealing with sensitive issues Is aware of risks and makes decisions accordingly Adapts effectively to change Seeks feedback and reviews own performance |

Acknowledged by occupant

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(Print name)

(Signature)

Acknowledged by line manager

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(Print name)

(Signature & title)