



Job Description Form

Department of the Attorney General Purpose

To provide high quality and accessible justice, legal, registry, guardianship & trustee services that meet the needs of the community and government.

Position Title Trust Manager		
Effective Date May 2014	Position Number Generic	Level 3
Branch Trust Management	Division Public Trustee	Directorate Client Services

Divisional Outcomes

Provide a comprehensive range of affordable, quality, secure and impartial trustee and asset management services to Western Australians.

The Public Trustee is responsible for:

- Administering estates of people who die with or without a will (estate administration)
- Managing the financial affairs of people who are unable to manage their financial affairs or for people seeking assistance (trust management)
- Preparing wills for people who are willing to appoint the Public Trustee as their executor (wills)

Directorate Outputs

The Client Services Division is responsible for the delivery of all of the Public Trust Office's products and services. This includes:

- Estate Management
- Trust Management
- Will Drawing

Branch Outputs

The Trust Management Branch administers the financial affairs of incapable and represented persons, Court trusts, agencies and other trusts. This may include

- investment portfolios
- farms
- partnerships
- businesses
- complex real estate transactions
- mining interests
- leases and vehicles.

Role of this Position

Administer the financial affairs of incapable and represented persons, Court Trusts, agencies and other trusts of medium complexity and low value, in accordance with relevant legislation.

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Responsibilities of this Position

Trust Administration

Administer the financial affairs of incapable and represented persons, Court Trusts, agencies and other trusts with medium complexity and up to a value of \$75,000.

- Represents the Public Trustee at hearings of the State Administrative Tribunal.
- Preparation of budgets to account for the current and future needs of clients.
- Authorises payment of general living expenses to Western Power, Alinta Gas, Telstra, Water Corporation and Council Rates and Taxes, etc.
- Authorises periodical and ad-hoc payments to clients for personal expenses.
- Authorises periodical payments of fees to nursing homes, hostels or similar institutions for clients maintenance and comfort.
- Approves payments for funeral expenses where sufficient funds are available from the estate.
- Approves educational expenses for clients or dependents.
- Re-invest or invest in assets in shareholdings, term deposits.
- Ensures the assets are insured at current market value.
- Executes the signing of documents under Common Seal on behalf of the Public Trustee for Certificates of Appointment, statutory declarations and Enduring Powers of Attorney.
- Creates client files in the Management Accounting and Trust Environment (MATE) computer system and ensures that all transactions are recorded into the system.
- Performs reconciliations of financial transactions against client accounts.
- Ensures that all client files comply with all legislative, accounting and administrative obligations relating to individual estates administered.

Communication (Written and Oral)

- Provides advice and information to clients, departments and external organisations in relation to a range of matters affecting the administration of financial affairs of deceased persons.
- Drafts correspondence to clients and organisations in accordance with departmental formats in a timely and accurate manner.

Negotiation and Problem Solving

Assists clients with developing solutions to matters through research, analyses and negotiation.

Teamwork

Participates constructively and positively within workplace teams to achieve tasks.

Continuous Improvement

Contributes to the effective and efficient delivery and improvements of estate management services.

Information and Knowledge Management

Effectively establishes and uses systems for information gathering, recording, and contributes to the development of strategies for knowledge management for all Directorates of the Public Trustee.

Stakeholder Relationship

Establishes and maintains effective relationships with departmental staff, government departments and private organisations to communicate and receive information.

Corporate citizenship

Demonstrate high standards and practice of ethical conduct and behaviour as required under the Departments frameworks of Code of Conduct and Public Sector Code of Ethics.

Demonstrate a commitment to the ethos of Equal Employment Opportunity principles through personal conduct and daily interaction with colleagues.

Demonstrate commitment to the legislative obligations set out in the *Occupational Health and Safety Act 1984*.

Take reasonable care to ensure their own safety and health, and that of others at work, and comply with the department's policies and any other direction given for their safety and health in the workplace.

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Skills, Knowledge, Behaviours and Qualifications

For purpose of training etc.

SKILLS

COMMUNICATION

Well developed oral and written communication skills including the ability to negotiate to a successful outcome with a diverse client group including clients who suffer from mental and physical disabilities.

RESEARCH AND ANALYTICAL SKILLS

Ability to relate and compare data from different sources, identifying issues, securing relevant information, and identifying relationships.

PROBLEM SOLVING

The ability to develop effective solutions to identified and routine problems to achieve positive outcomes.

TIME MANAGEMENT AND ORGANISATIONAL SKILLS

The ability to prioritise, organise and complete tasks within set timeframes.

INITIATIVE

A bias for proactively taking action and not simply thinking about future actions. This includes anticipating work requirements in order to enhance job results, avoid problems and create opportunities.

CUSTOMER SERVICE

The ability to create, maintain and enhance relationships with clients, staff and others through constructive & customer-focused interaction in order to achieve work goals.

FINANCIAL AND BUDGETING

The ability to source and investigate the finances of a person in order to establish their current financial status and prepare personal budgets.

INTERPRETATION

The ability to interpret and apply legislation.

TECHNICAL SKILLS

The ability to develop and manipulate data using MS Office products, including Word, Excel and Outlook.

COACHING SKILLS

The ability to continuously appraise, discuss and counsel a trainee in undertaking practical exercises or actually performing a job.

KNOWLEDGE

- Demonstrated knowledge of the legislative requirements and administrative procedures related to trusts administration.
- Understanding of Occupational Safety and Health and Equal Employment Opportunity legislation.

QUALIFICATIONS

Tertiary qualification in a relevant discipline, typically Accounting.

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Work Related Requirements (Selection Criteria)

The work related requirements to be addressed in the application are stated in the Application Package.

The following work related requirements may be assessed at different stages of the selection process.

ESSENTIAL

SKILLS

COMMUNICATION

Well developed oral and written communication skills including the ability to negotiate to a successful outcome with a diverse client group including clients who suffer from mental and physical disabilities.

PROBLEM SOLVING

The ability to develop effective solutions to identified and routine problems to achieve positive outcomes.

CUSTOMER SERVICE

The ability to create, maintain and enhance relationships with clients, staff and others through constructive & customer-focused interaction in order to achieve work goals.

FINANCIAL AND BUDGETING

The ability to source and investigate the finances of a person in order to establish their current financial status and prepare personal budgets.

TIME MANAGEMENT AND ORGANISATIONAL SKILLS

The ability to schedule activities, in the time available effectively to meet deadlines.

INTERPRETATION

The ability to interpret and apply legislation, complex documents and departmental policies and procedures.

TECHNICAL SKILLS

The ability to develop and manipulate data using MS Office products.

KNOWLEDGE

Demonstrated knowledge of the legislative requirements and administrative procedures related to trusts administration.

DESIRABLE

QUALIFICATIONS

Progress toward a tertiary qualification in a relevant discipline, typically Accounting.

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Reporting Relationships

Title
Trusts Business Manager
Classification
Level 7

↑
Responsible To

Title
Senior Trust Manager
Classification
Level 6

↑
Responsible To

THIS OFFICE

Other offices reporting to this office
Title and Classification:
Trust Manager Level 4 (x4)
Trust Manager Level 3 (x3)
Trust Officer Level 2 (x2)

Offices under direct responsibility		
Title	Classification	Number of FTEs Supervised and controlled

Certification

The details contained in this document are an accurate statement of the duties, responsibilities on other requirements of the position.

Executive Director / Chief Executive Officer
Signature
Date