



Job Description Form

Department of Justice Purpose

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

Position Title Trust Manager		
Effective Date March 2018	Position Number Generic	Level 5
Division Public Trustee	Directorate Trustee Services	Branch Trust Management

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:

- Deceased estate administration
- Will drawing service
- Trustee services for infants and incapable persons
- Financial management services under Power of Attorney and enduring Power of Attorney

Directorate Outputs

The Trustee Services Directorate is responsible for the delivery of all of the Trustee products and services.

This includes:

- Estate Management
- Trust Management
- Private Administrator Support

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 to high complexity and high 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 to high complexity and to a value in excess of \$400,000.

- Represents the Public Trustee at hearings of the State Administrative Tribunal.
- Preparation of budgets to account for the current and future needs of clients.
- Approves the sale of realty up to \$600,000 and sale or purchase of shares, furniture, effects and motor vehicles.
- Engages building consultants for the construction of special purpose housing for clients with disabilities.
- Liaises with parents and/or carers to determine requirements for clients with physical and/or mental disabilities and employs carers and authorises the payment of wages, superannuation, workers compensation and PAYE tax deduction.
- Approves the execution of documents under Common Seal behalf of the Public Trustee transfer of motor vehicles.
- 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, sale of shares 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 trust 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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Work Related Requirements

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

ESSENTIAL

COMMUNICATION

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

PROBLEM SOLVING

The demonstrated ability to develop effective solutions to difficult 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 demonstrated ability to interpret and apply legislation.

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 Snr Manager Trusts
Classification Level 6

Responsible To

THIS OFFICE

Other offices reporting to this office

Title and Classification:

Trust Manager – Level 5 (Various)
Trust Manager – Level 4 (Various)
Trust Manager – Level 3 (Various)
Trust Manager – Level 2 (Various)

Offices under direct responsibility

Title	Classification	Number of FTEs Supervised and controlled

LOCATION AND ACCOMMODATION	LOCATION Perth
	ACCOMMODATION Nil
ALLOWANCES/SPECIAL CONDITIONS	Nil

Certification

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

DELEGATED AUTHORITY APPROVAL *As per the Human Resource Management Delegations*

Delegated Authorities Name	Brian Roche
Signature	
Date	16 March 2018