



Job Description Form

Trust Manager

Trust Management Branch

Position details

Classification Level: 5

Award/Agreement: PSA 1992 / Public Sector CSA Agreement
(and subsequent agreement/s)

Position Status: Permanent

Organisation Unit: Public Trustee - Trustee Services

Physical Location: Perth CBD

Reporting relationships

Responsible to: Senior Trust Manager (Generic) – Level 6

This position: Trust Manager (Generic) – Level 5

Direct reports: NIL

Overview of the position

The Trustee Services Directorate comprises of the Trust Management Branch, Estate Management Branch and Private Administrator Support Branch.

The Trust Management Branch is responsible for the administration of the financial affairs of represented persons, who by Order of the State Administrative Tribunal (SAT) appoints the Public Trustee to act as administrator for clients who suffer from cognitive functioning and physical difficulties.

Trust Management is also responsible for the management of trusts where the Public Trustee is appointed as trustee by the District and Supreme Court and independent parties. This also extends to the management of trusts for minor beneficiaries where the Public Trustee administers the estate.

The Trust Manager is responsible for the administration of the financial affairs of represented persons, Court Trusts, agencies and other trusts of medium to high complexity and with a value in excess of \$400,000 in accordance with relevant legislation. The position provides assistance and advice to develop effective solutions to enquiries by clients, departments and external organisations in relation to a range of matters affecting the administration of financial affairs of represented persons and management of trusts.

Job description

As part of the Trust Management Branch team, the successful applicant will be expected to:

- Work to improve communication and model integrity and respect in all interactions.
- Operate within the Department's Corporate Governance Framework, policies and procedures and ensure effective transparency and accountability of all Department activity.
- Operate within the chain of command to coordinate activities required to meet the Department's strategic objectives.
- Work collaboratively to achieve common goals and best practice and facilitate business improvements as appropriate.
- Facilitate cultural and management reforms within the Department through leadership and engagement.
- Represent the Department's interest on committees and working groups as required.

Role specific responsibilities

Administer the financial affairs of 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 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 on behalf of the Public Trustee for transfer of motor vehicles.
- Authorises payment of general living expenses to service providers for power, water, gas, telecommunications 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 the maintenance and comfort of clients.
- Approves payment 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.
- Other duties as required in accordance with strategic objectives, business plans, local workload priorities and performance management plans.

Job related requirements

In the context of the role specific responsibilities, the ability to demonstrate the following skills, knowledge and experience.

Shapes and Manages Strategy

The ability to; understand the Department's objectives and links to the whole-of-government agenda, understand the strategic direction and objectives of the business unit and the factors that may impact on work plans and operational goals, draw on information from a range of sources and use judgement to analyse findings, work within agreed guidelines to make decisions and to incorporate outcomes into work plans are important for this role.

Achieve Results

The ability to; assess project and program performance, identify areas of improvement and suggest changes to ensure positive outcomes, demonstrate flexibility and cope with day-to-day changes in priorities, support projects to completion and a focus on quality in all areas of work are fundamental to this role.

Builds Productive Relationships

The capacity to; network effectively in order to build and sustain relationships with key stakeholders, team members and other staff in the agency, consult and share information with the team and seek input from others where necessary, encourage contribution and engagement, recognise different views and to ensure that stakeholders are kept informed as appropriate are requirements for this role.

Exemplifies Personal Integrity and Self-Awareness

A commitment to; adhere to the Code of Conduct in all interactions, maintain a high level of personal commitment to integrity, professionalism, probity and personal development, take responsibility for completion of works within timeframes and takes the initiative to progress work when required. Able to justify own position when challenged. Acknowledge mistakes and learn from them and seek guidance and advice when required. Engage with risk by providing impartial and clear advice, seeking guidance when required, identifying and/or reporting potential risk issues to supervisor.

Communicates and Influences Effectively

A demonstrated ability to; present messages confidently and persuasively and to actively listen, understand and adapt communication styles to suit a range of audiences, listen to differing views and opinions and develop persuasive counter arguments are requirements for this role.

Role Specific Criteria

- Demonstrated knowledge of the legislative requirements and administrative procedures related to represented persons and/or trusts administration.

Special requirements/equipment

Nil

Certification

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

Public Trustee

Signature: _____ Date: 7 June 2022

HR certification date: June 2022