



Job Description Form

Generic Estate Manager

Estate Management Branch

Position details

Classification Level: 3

Award/Agreement: Public Service Award 1992 / Public Sector CSA Agreement 2019

Position Status: Permanent

Organisation Unit: Public Trustee - Trustee Services

Physical Location: Perth CBD

Reporting relationships

Responsible to: Generic – Senior Estate Manager – Level 6

This position: Generic – Estate Manager – Level 3

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 Estate Management Branch is responsible for the administration of estates of deceased persons in accordance with their will or in accordance with the *Administration Act 1903* where the person dies intestate.

The Estate Management Branch arranges funerals for persons who die leaving no family or next of kin willing to make funeral arrangements and matters referred by the Department of Public Prosecutions pursuant to the Criminal Property Confiscation Act.

The Estate Manager is responsible for the administration of the estates of deceased persons of low to moderate complexity and manages the disbursement of their assets in accordance with the terms of the will or relevant legislation.

Job description

As part of the Estate 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.

Role specific responsibilities

Estate Administration

Administers the estates of deceased persons with low to moderate complexity that may include bank accounts, motor vehicles, furniture, effects, jewellery and shareholdings.

- Collects and collates information required for an application to the Supreme Court for authority to administer an estate. (Death Certificate, confirmation of witnesses, value of the estate and capacity of deceased).
- Approves payments for funeral expenses.
- Interprets wills in order to establish entitlements in estates.
- Liaises with the Public Trustee's provider of search and removal services to clear house properties as required.
- Consults with beneficiaries to outline the estate administration process and of the options available for disposal, realisation or management of assets.
- Collects cash assets and undertakes research to identify assets and liabilities of clients.
- Ensures all assets under the control of the Public Trustee are adequately insured.
- Liaise with providers of genealogical services to identify and locate beneficiaries.
- Collects information for the preparation of taxation returns.
- Creates client files in the Management Accounting and Trust Environment (MATE) computer system and ensures that all data and transactions are recorded into the system.
- Performs reconciliations and prepares financial statements and makes payments to beneficiaries entitled in estates.
- 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 reasons for decisions made within the division and be able to explain how they are related to their work, identify issues that may impact on the achievement of goals and inform supervisor, utilise knowledge of the work environment to contribute to planning activities, draw information from a variety of sources and apply common sense to analyse what information is important/relevant are all important for this role.

Achieve Results

The ability to; reschedule and reorganise work to reflect changes in priorities, demonstrate knowledge of new programs, plans or services that are relevant to the position, maintains accurate records and files; and, ensure that tasks are completed within allocated timeframes are all fundamental to this role.

Builds Productive Relationships

The capacity to; build and maintain relationships with senior management colleagues and clients, share information with stakeholders and seek input from others to inform team discussions, ensure that relevant/important information is shared where required, treat people with respect and courtesy and to act on constructive feedback are requirements for this role.

Exemplifies Personal Integrity and Self-Awareness

A commitment to; adhere to the Code of Conduct in all interactions, behave in a honest professional and ethical way, check and confirm the accuracy of all information prior to release, take responsibility for the completion of work and seek guidance where necessary, stay calm under pressure and not react personally to criticism, acknowledge mistakes and learn from them, meet agreed performance levels and seek and accept supervisor feedback and guidance are all important for this role. Engage with risk by providing accurate information, seeking guidance when required and reporting potential risk issues to supervisor.

Communicates and Influences Effectively

An ability to; structure messages clearly and succinctly orally and in writing, gain a clear understanding of others comments by actively listening and asking questions to ensure understanding – checks that own views have been understood and able to discuss issues thoughtfully without becoming aggressive are requirements for this role.

Role Specific Criteria

- Demonstrated knowledge of the legislative requirements and administrative procedures related to deceased estate 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: 08/07/2020

HR certification date: July 2020