



Government of **Western Australia**
Department of **Justice**

Job Description Form

Estate Administration Officer

Estate Management Branch

Position details

Classification Level: 2

Award/Agreement: Public Service Award 1992 / Public Sector CSA Agreement
(and subsequent agreements)

Position Status: Permanent

Organisation Unit: Public Trustee - Trustee Services

Physical Location: Perth CBD

Reporting relationships

Responsible to: Senior Estate Manager (Various) – Level 6

This position: Estate Administration Officer (Generic) – Level 2

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.

An Estate Administration Officer undertakes an in-house training program to develop their knowledge in the Management Accounting and Trust Environment (MATE) computer system and in the policies and procedures associated with the administration of formal and informal deceased estates.

The Estate Administration officer will be responsible for assisting Estate Managers in opening client files, gathering financial information, processing and reconciliation of financial accounts, client services, drafting correspondence and data entry.

Job description

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

- Always consider the unique risks associated with the Department's activities when undertaking all duties
- Communicate effectively, 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 Department's chain of command to coordinate activities required to meet the Department's strategic objectives
- Work collaboratively with staff in other directorates and within the division to achieve common goals and best practice and facilitate business improvements as appropriate, demonstrated analytical problem-solving skills, customer focus and alignment with Departmental strategic objectives
- Drive and support organisational change and continuous improvement by actively contributing to achieve the Department's vision, mission and priorities
- Support cultural and management reforms within the Department.

Role specific responsibilities

Estate Administration

Under instruction of an Estate Manager, an Estate Administration Officer undertakes training and, in the policies, procedures and systems associated with deceased estate administration and assists with the management of client files by performing the following tasks:

- Creates Estate client files in the Management Accounting and Trust Environment (MATE) computer system.
- Undertakes research to identify client income, assets and creditors.
- Prepares financial statements and undertakes reconciliation of financial transactions against client accounts.
- Assists with data entry of receipts and payments into the Management Accounting and Trust Environment (MATE) computer system.
- Assists with the preparation and drafting of correspondence and reports.
- Undertakes reconciliations of financial transactions against client accounts.
- Deals with and answer's client telephone enquiries.
- Supports the liaison, investigation and identification of assets and liabilities for informal deceased estate administration.
- Assists with identifying next of kin and liaises with family, agencies and funeral directors to prepare worksheets where funeral arrangements need to be conducted by the Public Trustee contractor.
- 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 values and objectives how they are relevant in assigned work, and to work under direct supervision to meet timelines and priorities.

Achieve Results

The ability to see tasks through to completion; rescheduling and reorganising work to reflect changes in priority. Applies own expertise to work tasks, learn new products and services and maintain accurate records and file.

Builds Productive Relationships

The capacity to responds under direction to changes in client needs and expectations, manage progress and keeps clients informed and provide prompt and courteous service, as well as the capacity to recognise the value of individual differences and work styles.

Exemplifies Personal Integrity and Self-Awareness

A demonstrated commitment to adhere to the Code of Conduct, behave honestly and ethically. Applies self to meet objectives, stay calm and professional under pressure, and provide accurate information to others. Provides accurate information, checks and confirms accuracy prior to release. Acknowledges mistakes and learns from them, and seeks guidance and advice when required.

Communicates and Influences Effectively

The ability to explain information using language appropriate to the client while limiting the use of jargon, listen and ask questions to ensure understanding and to confirm that the message has been understood and to discuss issues calmly.

Role Specific Criteria

- The ability to read, understand and apply departmental policies, procedures and legislation.

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: March 2025

HR certification date: March 2025