

<b>Position title</b>	<b>Deceased Accounts Officer</b>
<b>Division</b>	Operations, Processing & Servicing (OPS)
<b>Department</b>	Account Support & Distribution - Servicing, Experience & Account Support
<b>Direct Reports</b>	No

### Our culture and values

We have a clear strategy and important work in place to become Australia's bank of choice.

Our values of **teamwork, integrity, performance, engagement, leadership** and **passion** are at the core of who we are and form the expectation of the behaviours we adopt every day.

We strive to have a culture that drives balanced outcomes; is open and informed for disciplined execution; that celebrates and recognises success; and where the sum is greater than its parts. To achieve this, we focus on four critical behaviours: **act commercially; move fast to help customers achieve their goals; recognise people for their impact; and actively challenge the status quo.**

Together, we're creating a culture we can continue to be proud of; one that will help us reach new heights.

### ROLE PROFILE

#### Your division, your team

Bendigo and Adelaide Bank's strategy is built on our vision of being Australia's leading customer connected banking group.

Servicing, Experience & Account Support function contributes towards this vision by developing and executing strategies which will deliver our products and services to our customers in an efficient and cost-effective manner. A culture of operational excellence underpins this, with the delivery of highly efficient and robust operational platform impacting the experience of our customers and partners, which in turn delivers the customer value proposition.

The Deceased Accounts Officer is responsible for ensuring deceased accounts are processed through the banking system in accordance with legislative requirements and Bank Policy and Procedures.

Success will come from effective execution of a broad set of key result areas.

#### The purpose of your role

The Deceased Accounts Officer is responsible for providing professional, timely and high-quality administrative support to deceased customer's families, solicitors, third parties and internal customers.

The position is primarily responsible for providing administrative support to Branch staff, internal departments and third parties to ensure that Deceased Accounts are processed through the banking system in accordance with legislative requirements as well as relevant Policy & Procedures.

#### Your core relationships

*Reports to:* Team Manager Account Support - Account Support & Distribution

Nil direct reports

## What you're accountable for

<b>Productivity</b>	<ul style="list-style-type: none"> <li>• Meet all turnaround times for Deceased Accounts as per set service level requirements.</li> <li>• Achieve set individual daily / monthly productivity targets or measurements.</li> <li>• Provide first time resolution to phone calls and written enquiries received from internal parties, solicitors, Executors and Next of Kin in relation to Deceased Accounts and the relevant bank processes and documentation.</li> <li>• Review support documentation and action Deceased Accounts, ensuring that relevant information and funds are released in accordance with the Bank's legal requirements, policies and procedures.</li> <li>• Undertake administrative functions such as account maintenance, completion of vouchers, closure of accounts, reporting and record keeping.</li> <li>• Assist other team members as required.</li> </ul>
<b>Quality</b>	<ul style="list-style-type: none"> <li>• Meet any agreed quality / error targets.</li> </ul>
<b>Risk</b>	<ul style="list-style-type: none"> <li>• All personal mandatory risk training is completed by the due date.</li> <li>• Operate within personal approved limits (with no breaches of those limits) without authorisation from the appropriate oversight body, for the policies of:             <ul style="list-style-type: none"> <li>- Delegated Lending Authority</li> <li>- Consecutive Annual Leave</li> <li>- Group Authorities Register</li> </ul> </li> <li>• Report any concerns, loss events or incidents of non-compliance to your BURA/Line Manager.</li> <li>• Compliance with all Bank policies.</li> </ul>
<b>General</b>	<ul style="list-style-type: none"> <li>• Undertake special projects and other duties from time to time and as directed.</li> <li>• Assist with other tasks as and when requested.</li> <li>• Proactively provide assistance and share your knowledge with other team members.</li> <li>• Work in co-operation with colleagues to achieve team and business objectives.</li> </ul>
<b>Bank Values &amp; Community</b>	<ul style="list-style-type: none"> <li>• Consistently demonstrate behaviour in accordance with the Bank's corporate values and policy requirements.</li> <li>• Continually support and contribute to the Servicing, Experience &amp; Account Support team.</li> <li>• Be actively involved in community activities supported or initiated by the Bank and work with other areas of the Bank to support existing community initiatives and identify new opportunities.</li> </ul>

## Your knowledge, skills and experience

<b>Knowledge &amp; skills</b>	<ul style="list-style-type: none"> <li>• A working knowledge of Banking platforms (RFS) is preferred.</li> <li>• Basic knowledge of accounting practices as they relate to debits, credits and balancing.</li> <li>• Good verbal and written communication skills.</li> <li>• Good interpersonal skills to enable liaison with both internal and external customers from a diverse range of user groups.</li> </ul>
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	<ul style="list-style-type: none"> <li>• Ability to learn on-the-job together with the ability to work within a fast-paced environment with daily deadlines</li> <li>• Microsoft experience: Outlook, Word, Excel - intermediate level preferred</li> <li>• Banking platforms RFSB, Doxgate, BPM knowledge or similar systems preferred.</li> </ul>
<b>Relevant experience</b>	<ul style="list-style-type: none"> <li>• Experience in deceased account legal requirements as well as relevant Bank Policies and Procedures is preferred.</li> </ul>

**Your qualifications and certifications**

N/A

**Risk responsibility**

Ensure all work practices are conducted in accordance with all Bank compliance requirements, as specified in Bank policy, corporate and business unit procedures and identify and report instances of non-compliance to appropriately.

## CAPABILITY PROFILE

### Key people capabilities

<b>Relationships</b>	<b>Results Focus</b>
<b>Grow Self</b>	<b>Role Expertise</b>

### People capability profile

<b>Relationships</b>	<b>Results Focus</b>	<b>Grow Self</b>	<b>Role Expertise</b>
Builds and maintains productive relationships with trust and integrity. Works collaboratively and is open to the perspectives of others.	Sets and manages relevant goals. Is mindful of and responds to the business environment. Asks for help and reviews for learning.	Grows knowledge, is curious and proactively applies learning. Builds resilience and is mindful of impact on others.	Maintains role-specific standards and applies knowledge, skills and experience on-the-job.
<b>Foundational</b>	<b>Foundational</b>	<b>Foundational</b>	<b>Foundational</b>

### Role motivators

<b>Achievement</b>	Gaining a sense of achievement, closure; seeing something through to completion; working towards attainable goals
<b>Growth</b>	Having opportunities to acquire knowledge, learn new skills and improve own performance
<b>Variety</b>	Performing a variety of tasks and activities on a regular basis