

## Statement of Duties

TITLE:	Client Account Manager
POSITION NUMBER:	Various
DIVISION / BUSINESS UNIT:	Client Services, PS Team
LOCATION:	Launceston
AWARD/CLASSIFICATION:	Tasmanian State Service Award, General Stream Band 4

## Organisational Context

Public Trustee is a Government Business Enterprise (GBE) whose basic powers and duties are set out in the Public Trustee Act 1930.

Our aim is to provide a safety net to all Tasmanians, always: helping them to protect their legacy through our services of wills, estates, and financial administration.

Core to our purpose is the provision of financial administration services to Represented Persons.

The primary values of the staff, management and Board of Directors are:

- Service - a client service focus achieved by teamwork across the whole organisation
- Respect - personal and professional respect for each other and our clients
- Integrity - open, honest and ethical service delivery.

We provide our services with empathy, dignity, and respect. We have our customers at the centre of everything we do. Sound governance, communication and a responsive and personable culture underpins our work at Public Trustee.

## Position Objective

This position contributes to the efficient and effective operation of the Personal Services team in the Launceston Branch of the Client Services Division by undertaking financial administration, power of attorney and trust administration duties.

## Reporting Structure

This position is responsible to the Manager, Personal Services team and specialist functions are undertaken under general direction and/or general supervision based on established procedures and practices. The occupant is expected and encouraged to exercise limited discretion and choice in selecting the most appropriate method for completing the allotted tasks consistent with the possession of knowledge in this field.

The exercise of a formal discretion is a feature of this position.

## Major Functions

1. Manage a caseload of complex files ensuring that financial administration, power of attorney and trusts are managed effectively in accordance with relevant legislation, procedural guidelines and client instructions.
2. Exercise a formal discretion in relation to the management of client files.
3. Work with clients to set up and maintain client budgets including approving expenditure, authorising payment of invoices, issuing of payment vouchers, coordinating of liability repayment plans, and addressing client queries.
4. Liaise with clients regarding their financial administration by telephone, in writing, and in person, undertaking client visitations as required.
5. Attend Guardianship and Administration Board hearings to represent the Public Trustee and clients.
6. Engage in proactive client service and relationship building through efficient, effective, timely and professional interactions with clients.
7. Contribute to the achievement of team objectives.

## Knowledge and Skills (Selection Criteria)

Candidates should address the selection criteria in the context of the position objectives and the major functions. All applicants will be assessed against these criteria.

1. Comprehensive knowledge of and substantial experience in the trustee industry, client services, social or disability services or another associated industry.
2. Demonstrated initiative, judgement and discretion and effective problem-solving skills.
3. Proven ability to work effectively individually and as part of a team in the efficient and timely delivery of professional client services combined with demonstrated self-management and time management skills including the ability to set and meet own work objectives and manage concurrent tasks and issues.
4. High level communication and interpersonal skills including well developed written communication, liaison, negotiation and conflict resolution skills.
5. Well-developed skills in maintaining and promoting excellent client service through identifying and understanding client needs and building effective relationships which will meet expectations.
6. Demonstrated capacity to behave in accordance with the Public Trustee's Values of Service, Respect and Integrity and the associated Behaviours.

## Requirements

- Wills • Estate Administration • Enduring Powers of Attorney • Enduring Guardianship
- Financial Administration • Trust Administration

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The Head of State Service has determined that the person nominated for this vacancy is to satisfy a pre-employment check before taking up the appointment, promotion or transfer.

The following checks are to be conducted:

1. Pre-employment checks
  - Arson and fire setting
  - Violent crimes and crimes against the person
  - Sex-related offences
  - Drug and alcohol related offences
  - Crimes involving dishonesty
  - Crimes involving deception
  - Making false declarations
  - Malicious damage and destruction to property
  - Serious traffic offences
  - Crimes against public order or relating to the Administration of Law and Justice
  - Crimes against Executive or the Legislative Power
  - Crimes involving Conspiracy
2. Disciplinary action in previous employment.
3. Identification check.

### Selection Process

The Public Trustee promotes equity in employment. It provides workplaces that are free from discrimination and recognises and utilises the diversity of the community it serves. In doing this, the Public Trustee acknowledges the individual differences that can contribute to the capacity of a person to perform the inherent requirements of the duties.

Employment decisions are based on merit. On that basis:

- an assessment is made of the relative suitability of the candidates for the duties,
- the assessment is based on the relationship between the candidates' work related qualities and the work related qualities genuinely required for the performance of the duties. Work related qualities might include: skills and abilities; qualifications; training and competencies; standard of work performance; capacity to produce required outcomes; relevant personal qualities and demonstrated potential for future development,
- the assessment focuses on the relative capacity of the candidates to achieve outcomes related to the duties, and
- the assessment is the primary consideration in making the decision.

Shortlisted applicants may be required to undergo a psychometric assessment.

### Working Environment

The expected behaviours and performance of the Public Trustee employees and managers are governed by the *State Service Act 2000* through the State Service

Principles and Code of Conduct. These can be located at [www.dpac.tas.gov.au/divisions/ssmo](http://www.dpac.tas.gov.au/divisions/ssmo).

The Public Trustee is committed to high standards of performance in relation to the provision of equal employment opportunity. All employees are expected to promote and uphold the principles of fair and equitable access to employment/promotion, personal development and training and the elimination of discrimination and harassment from the workplace.

In accordance with the *Work Health and Safety Act 2012* (the Act) all employees, whilst at work, are expected to participate in maintaining safe working conditions and practices and take reasonable care for their own health and safety, ensuring their actions do not adversely affect the health and safety of others. All employees are expected to comply with any reasonable instructions given by the Public Trustee to ensure compliance with the Act; and cooperate with Public Trustee Workplace Health and Safety Policies, Procedures and Guidelines

The occupant of this position is expected to contribute to the Public Trustee's duty of care to comply with the Act by ensuring members of their team(s) adhere to the responsibilities and expectations outlined above; and to be proactive in identifying and managing hazards in the workplace.

The substantive occupant is responsible for upholding and championing the Department's commitment to the safety and wellbeing of children and young people; actively participating in and contributing to our rights-based approach to care; meeting all obligations under the Child Safety and Wellbeing Policy, Professional Conduct Policy, and other Departmental child safety policies and complying with mandatory reporting obligations.

The occupant of this position may be required to operate screen-based equipment for more than 25% of the time.

The position is located in a smoke free, office based working environment.

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# Values and Behaviours

**SERVICE** - a client service focus achieved by team work across the whole organisation

We will take the time to listen to clients and understand their needs.  
We will deliver our services to our clients in a timely, accurate and caring manner.  
We will be approachable and accessible to our clients and proactively keep them informed.  
We will address clients' concerns and ensure that identified issues are resolved.  
We will accept responsibility for following through on commitments given to clients.  
We will take responsibility for making prompt and effective decisions.  
We will help each other out by sharing knowledge and resources.  
We will work with each other to continuously review the way things are done and seek better ways of doing things.  
We will present ourselves in a professional manner.  
We will work together cooperatively to achieve the goal of excellent client service.

**RESPECT** - personal and professional respect for each other and our clients

We will treat everyone in a courteous, professional manner.  
We will respect confidentiality at all times.  
We will show empathy and consideration in our dealings with others.  
We will value diversity and respect difference.  
We will demonstrate good practice in people management.  
We will consult with people about matters that affect them directly.  
We will treat others the way we would like to be treated ourselves.

**INTEGRITY** - open, honest and ethical service delivery

We will be honest and impartial in all our dealings.  
We will operate in an open and transparent manner.  
We will be receptive to the suggestions and contributions of others.  
We will make decisions in a fair and balanced manner.  
We will interact with everyone in a way that builds trust.  
We will be personally accountable for our actions.  
We will consistently keep our commitments and maintain confidentiality.