

Statement of Duties

TITLE:	Client Account Manager
POSITION NUMBER:	Various
DIVISION / BUSINESS UNIT:	Client Services, Personal Services Team
LOCATION:	Hobart
AWARD/CLASSIFICATION:	Tasmanian State Service Award, General Stream Band 3

Organisational Context

The objective of the Public Trustee is to offer quality, independent Trustee Services to the Tasmanian community and as a Government Business Enterprise provide a return on capital to Government.

In seeking to achieve the mission and vision of the Public Trustee, the primary values of the staff, management and Board of Directors are:

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

Employees are expected to uphold these values through appropriate workplace behaviour and to actively contribute to organisational and team objectives.

Position Objective

This position contributes to the efficient and effective operation of the Personal Services team in the Hobart Branch of the Client Services Division by undertaking financial 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 files, ensuring that financial administrations are managed effectively in accordance with relevant legislation, procedural guidelines and client instructions, maintaining client files and associated documentation.
2. 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.
3. Liaise with clients regarding their financial administration by telephone, in writing, and in person, undertaking client visitations as required.
4. Attend Guardianship and Administration Board hearings to represent the Public Trustee and clients.
5. Exercise a formal discretion in relation to the management of client files.
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 as required.

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. A good working knowledge and/or experience in the trustee industry or a financial services environment.
2. The ability to work effectively both individually and as part of a team in the efficient and timely delivery of professional client services in a changing environment.
3. Well developed communication and conflict resolution skills, effective interpersonal skills, including the ability to deal with a wide range of people in a sensitive and confidential manner.
4. The ability to maintain and promote excellent client service through identifying and understanding client needs and building effective relationships.
5. Effective time management skills with the ability to undertake multiple tasks simultaneously under tight deadlines and time pressures.
6. Demonstrated capacity to behave in accordance with the Public Trustee's Values of Service, Respect and Integrity and the associated Behaviours.

Requirements

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.

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 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.

Issue date: March 2021

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.

GUIDELINES FOR APPLICANTS

The Public Trustee is a Government Business Enterprise (GBE) established under the *Government Business Enterprises Act 1995*. As a Government Business Enterprise the Public Trustee is expected to operate within a commercial environment with other competitors in the market such as solicitors and private Trustee companies.

The principal legislation under which we administer our estates and trusts on a day to day basis is *The Public Trustee Act 1930*. We have four offices throughout Tasmania in Hobart, Launceston, Burnie and Devonport.

The initial step in the selection process is the comparison of applicants to the selection criteria which are derived from the statement of duties. It is important that you ensure you clearly address the selection criteria in terms of knowledge, experience, skills, qualifications and potential for future development in your application. Applicants will be selected for interview on their ability to meet the criteria and interview questions will also be based on the selection criteria. Your application should also contain a Form 201 Tasmanian State Service Application for employment and a resume or curriculum vitae.

Referee reports are an important part of the selection process and may be used by a selection panel to gain information about your performance or background. Referees should therefore be able to comment on your work related performance. We would also suggest that as a matter of professional courtesy, you advise your referees on your intention to nominate them to support your application.

More information about the Public Trustee can be obtained from our web site at www.publictrustee.tas.gov.au. The contact officer nominated in the advertisement will be pleased to discuss the duties of the position, or any other particular query you may have. Please do not hesitate to contact them.

The selection panel may decline to consider any application below the necessary standard or that does not provide adequate information in response to the advertisement. Unfortunately, an application received after the closing date may not be accepted.

We look forward to receiving your application.

SUGGESTIONS ON ADDRESSING THE SELECTION CRITERIA

Selection criteria describe the particular skills, abilities, knowledge and qualifications (if any) required to achieve the outcomes of the position. Applicants are rated against the criteria in order to select the most meritorious applicant. Each criterion should be answered individually.

The following process is a guide to assist you in answering selection criteria.

1. Read the selection criteria, position objectives and major functions carefully.
2. Identify the major factors in each selection criterion.
3. Determine how you meet each criterion
 - a. The introduction might be 'I possess a high level of skill in ...' identifying things you do in relation to this criterion.
 - b. You should then support this statement, such as 'In my role of ... I have ...'. This is an example of a previous situation where you have demonstrated a particular skill or ability, giving consideration to what tasks were involved, or how you would apply the skill or ability.
 - c. Expand on your previous statement by describing (step by step) what was involved in the process.
 - d. You should then provide some form of validation that demonstrates how you know the task undertaken was done correctly or well. This might take the form of accredited training, validation from superiors, customer satisfaction surveys etc.
4. It is best to use positive language from a personal perspective unless you are referring to a team situation whereby you should provide insight into your particular role within the team.
5. Ensure that you have not over or undersold yourself.

Tips

- Where appropriate, use dot points in your answers to help with clarity;
- The length of your response will vary on the level of your position but should range from ½ to 1 page for each criterion. The more senior the position, the more detailed the response;
- In addressing criteria in relation to Estate and Trust work, think about past experience in other fields that might be relevant. When a person dies and leaves a will with the Public Trustee, we are responsible for administering the estate, particularly in relation to financial affairs. Trusts entail looking after someone's financial affairs that might be unable to look after those themselves, such as a minor or someone who does not have the physical or mental capacity to do so. Some relevant experience might include conveyancing, financial dealings or welfare or client contact areas such as Centrelink. There are a variety of skills that are required in dealing with these issues from legal aspects to communication. Even if you don't have specific experience, think about how you might go about dealing with Estates and Trusts and what skills you could apply.