

Statement of Duties

TITLE:	Client Account Manager
POSITION NUMBER:	Various
DIVISION / BUSINESS UNIT:	Trustee Services
REPORTING STRUCTURE:	Various
LOCATION:	Statewide
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 Trustee Services within the Client Services Division by undertaking one or more of the following: financial administration, power of attorney, trust or deceased estate administration duties.

Major Functions

1. Effectively manage and maintain a basic caseload of files in accordance with relevant legislation, procedural guidelines, documentation and client instructions.
2. Exercise a formal discretion in relation to the management of client files.
3. Engage in proactive client service and relationship building.
4. 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 a trustee industry, financial services or legal office 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 time management, 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. 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.

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.