

Statement of Duties

TITLE:	Senior Client Account Manager
POSITION NUMBER:	Various
DIVISION / BUSINESS UNIT:	Client Services Division, Estate Team
LOCATION:	Hobart, Launceston or Devonport
AWARD/CLASSIFICATION:	Tasmanian State Service Award, General Stream Band 5

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 Client Services Division by providing an accurate, timely and efficient administration in the areas of deceased estates, financial administrations, powers of attorney and trusts. This includes managing a high level caseload, exercising a formal delegation and discretion and engaging in proactive client service and relationship building to meet the objectives of the organisation.

Reporting Structure

This position is responsible to the Northern Manager and work is undertaken under general and limited supervision. The position requires a high degree of proficiency in the use of established administrative processes and highly effective supervisory skills.

The position requires the use of initiative and discretion and operates with a significant degree of independent judgement and autonomy in day to day activities. The exercise of a formal delegation and discretion is a feature of this position.

Major Functions

1. Manage a caseload of files with a high degree of complexity, ensuring that files are managed effectively in accordance with relevant legislation, procedural guidelines and client instructions.
2. Exercise a high level formal delegation and discretion in relation to the management of client files.
3. Engage in proactive client service and relationship building with clients, colleagues and stakeholders.
4. Assist in the development of the technical skill base within the team through the provision of training, coaching and performance feedback as required.
5. Act for the Northern Manager, 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. Comprehensive knowledge, experience and understanding of the trustee industry or an associated industry.
2. Experience of supervising a small team, allocating work; monitoring and providing feedback on performance; with a demonstrated ability to develop the team's skill base and contribute to the development of employee performance particularly through training and coaching.
3. Demonstrated research skills. Initiative, judgement, discretion and well developed problem solving skills.
4. Highly effective 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 self-management and time management skills including the ability to set and meet work objectives, manage concurrent tasks and issues.
7. 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.

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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.