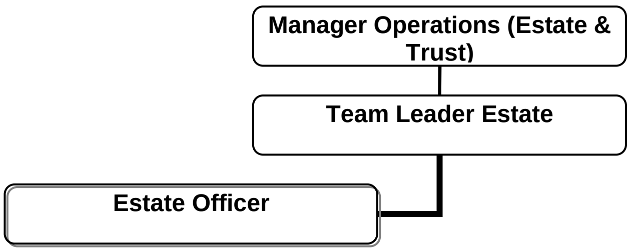
POSITION DESCRIPTION

Job Title:	**Estate Officer – EO**
Department:	**Operations/Estate & Trust**
Group / Team:	**Back-Office**
Responsible To:	**Manager (Operations) Estate & Trust/ Team Leader**
Salary Band	**$20,956 - $31,434**
Responsible For: **(Total number of staff)**	**0**
Job Purpose:	Estate Officer is responsible for providing a broad range of support in the provision of advice and the high-quality ongoing service to prospective, new, and existing customers. Is a member of the back-office team • Maintaining a customer case load, including file management and the preparation of internal and external documentation in accordance with the FPTCL Act, regulations, and Corporations standard operating procedures. • Provide expert and technical advice only to a wide range of clients on Wills and Estates provided by the Corporation. • Overlook the maintenance of assets and attend to meetings, field inspections, registration updates, insurance, and other statutory requirements. • Communicating clearly, regularly, and proactively to deliver on customer enquiries within agreed time frames. • The ability to participate in the implementation of change processes and practices to improve the quality of the customer experience. • Handling complaints, providing appropriate solutions and alternatives.
Date:	

Organisation Context



Key Relationships

External	***Purpose of contact with this person/s***
▪ Beneficiaries and guardians ▪ Suppliers/vendors ▪ Financial Institutions. ▪ Other government agencies	▪ Customers ▪ Provision of contractual of goods and services ▪ Personal Assets ▪ Compliance
Internal ▪ FPTCL Management & Staff	▪ Operational matters and dealing with the job requirements.

Key Result Areas / Key Achievement Areas

The position of **Estate Officer** encompasses the following major functions or Key Result Areas.

<table>
<tr><th>Jobholder is responsible for</th><th>Jobholder is successful when</th></tr>
<tr><th>Is Accountable for</th><th>And is Successful when</th></tr>
<tr><td>Estate Case Load Management</td><td></td></tr>
<tr><td>1. Estate Status and update
Report on estate listings and status
Estate statuses are updated on FileHold
Management of workflows and contracts.
All estates are to remain current
In accordance with Standard Operating Procedures (SOP) and all the relevant Acts, laws, and regulations.
All tax issues are rectified and tax compliance.
Proper and accurate charging of fees and charges when due in accordance with FPTCL Regulations – 2008.
Distribution and full settlement of cases within 1-3 years from acceptance.
Revenue collection target (individual and teams) is achieved as per monthly target.
Achieve recovery of progressive fees in full.
Estate incomes are collected, recorded, and documented i.e., rent, dividend, sale of assets or resources etc.
Inspection is carried out effectively and efficiently
All estate assets are recorded, documented, and managed with proper due diligence and all liabilities cleared.
With financial and calculation accuracy.
Proper filing and documentation in accordance with the internal procedures.</td><td>Provide monthly report on estate listing status.
Estate listing is up to date, and it is available in FileHold.
Workflows are completed within the specified timeframe.
Full compliance in operating procedures and legislations.
Revenue collection in accordance with sections budget.
Full recovery of progressive fees.
No cases due to negligence in the administration of Estates.</td></tr>
<tr><td>Engage & Strengthen Customer Relationship</td><td></td></tr>
<tr><td>Work to improve relationship with beneficiaries, guardians and community.
Well adverse with Customer Relationship Management System.
Provide updates to the CS teams on the respective tasks.
Any appointments scheduled by the CS Team to be always attended by the respective officer.
Keep track and ensure that all assign tasks are carried out effectively and efficiently.
Innovate and engage with the Team Leaders in Contributing to the system improvements.</td><td>Task deadlines are met, and appointments are carried out effectively and efficiently.
Continuous improvement in the system and SOPs to achieve the following:
Efficiency of Services
Quality of Services</td></tr>
<tr><td>Operating System</td><td></td></tr>
<tr><td>Initiate and update all status for the new and existing estate clients via FileHold.
Innovate and engage with the Team Leaders in Contributing to the system improvements.</td><td>Tasks are initiated, updated, and assigned via FileHold on a timely manner
100% compliance to FileHold processes and procedures (As per the SOP).
Continuous improvement in the system and SOPs to achieve the following:
Efficiency of Services
Quality of Services</td></tr>
</table>

Jobholder is responsible for	Jobholder is successful when
Is Accountable for	**And is Successful when**
Compliance	
• Compliance to all statutory requirements, SOP's, and policies. • Introduction of new systems and processes • Change Management initiatives	Full compliance and adherence to ensure continuous improvements and high standard of services is provided.
Document Management System	
• Digitise, record, and document all new and existing estate files via FileHold	• All related Estate documents are digitised on a timely manner with zero errors.
Community Awareness	
• Attend with the team for presentation and public awareness programmes as per the Corporations Marketing plan.	• Achieve prospective customers KPI's/BP • Increase new client as per KPI's/BP • Excellent presentation feedback assessment.
Other tasks assigned by the management team as and when requires.	

Key Behaviors / Competencies

- Persuasive speaking skills
- Empathy
- Adaptability
- Ability to use positive language
- Clear communication skill
- Self-control
- Taking responsibility
- Patience
- Effective listening
- Positive attitude and team player

Or Core Competencies

- Customer Service – Professional customer service and result driven
- Personal Attributes – High level of initiative and confidentiality
- Communication – Excellent written and verbal Skills
- Technology – Good working knowledge using systems such Customer Relations Management (CRMS), FileHold System, social media, and other applications.

Person Specification

This section is designed to capture the expertise required for the role at the 100% fully effective level (this does not necessarily reflect what the current jobholder has). This may be a combination of knowledge / experience, qualifications, or equivalent level of learning through experience or key skills, attributes, or job specific competencies.

Qualifications (or equivalent level of learning)

Essential	Desirable
▪ Relevant Degree qualification either in commerce, management or Legal	▪ Relevant Post graduate qualification either in commerce, management or Legal.

Knowledge / Experience

Essential *(Indicate years of experience required as appropriate)*	Desirable
▪ At least 2 years of experience as an estate & trust officer/ or similar role.	▪ 3 years of experience as a customer service officer/ estate & trust officer/ or similar role.

Key Skills / Attributes / Job Specific Competencies

The following levels would typically be expected for the 100% fully effective level:

Expert level	Professional Customer service orientation and case management tasks.
Advanced level	Knowledge and understanding of the functions of the Fiji Public Trustee and deceased estate administration.
Working Knowledge	Wills Making, Estate Administration, and the uses of technology - Customer Relations Management System (CRMS) and FileHold (FH)
Awareness	Relevant legislations, commercial statutory requirements, and best practices.

Change to job description

From time to time, it may be necessary to consider changes in the job description in response to the changing nature of our work environment– including technological requirements or statutory changes. This Job Description may be reviewed as part of the preparation for performance planning for the annual performance cycle or as required.

__________________________________ ______________________
Name: Date
Estate Officer

__________________________________ ______________________
Name: Date
Manager Estate & Trust

__________________________________ ______________________
Approved: Name: Date
Chief Executive Officer

OTHER OPTIONS FOR JOB DESCRIPTIONS USED FOR JOB EVALUATION

Work Complexity

Most challenging duties typically undertaken, or most complex problems solved:
▪ Understand the goals and objectives of estate administration to administer the affairs of estates of deceased persons to maximize value and minimize risk. ▪ Judgement to apply analysis of files and interpretation of estate laws and regulations and choose an approach using a combination of accepted estate administration procedures to administer the affairs of estates, which includes disposing of assets and liabilities. ▪ Ability to collect and recover fees for any estate administration or any related tasks from clients.

Freedom To Act

Guidelines available to assist job holders to make decisions e.g., policy documents, standard procedures.

- Customer Service Policy
- Standard Operating Procedures
- All FPTCL Policies & Guidelines
- Relevant Acts and Legislation

Financial Responsibilities

Controls a budget Y/N

Maximum that may be spent without reference to manager ________________________

Jobholder can spend unbudgeted capital Y/N. Amount___________________

Jobholder is responsible for committing the organisation to long-term contracts Y/N

Jobholder signs correspondence for Company Y/N