

JOB DESCRIPTION

Benchmark Job #006

Ministry: Attorney General
Branch: Office of the Public Trustee
Location: Vancouver

Working Title: **Estate Officer**
Level: Range 15
Classification: Administrative Officer

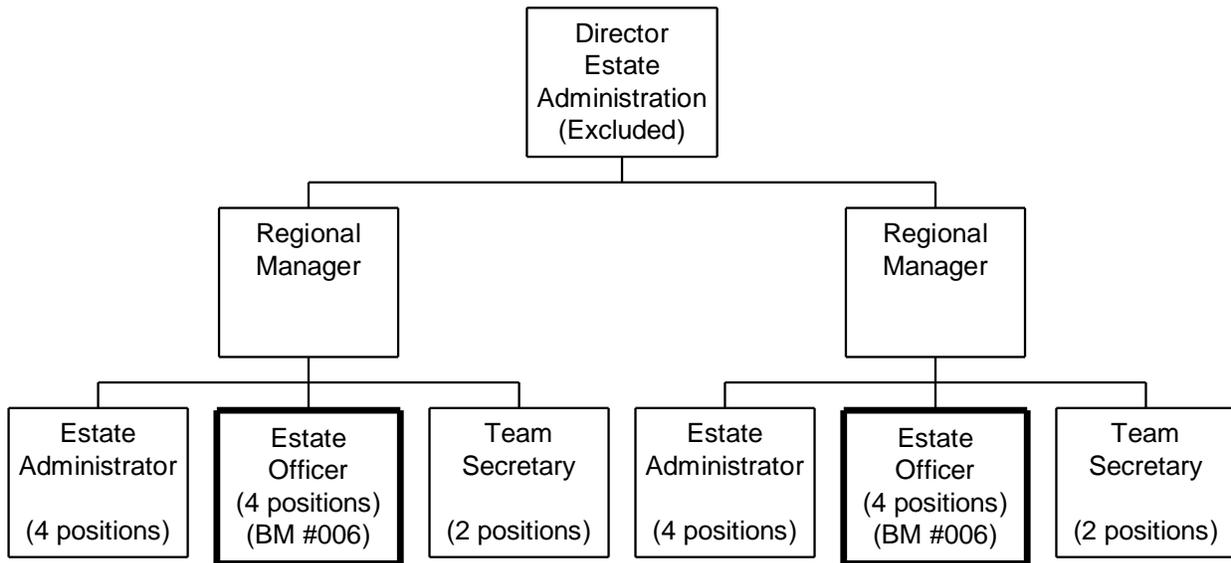
PRIMARY FUNCTION

To administer the estates of deceased persons in which the Public Trustee is acting in the capacity of Official Administrator for the Province, appointed Executor, Committee or Guardian of an heir or beneficiary in accordance with legislation such as the Estate Administration Act, Wills Act, Wills Variation Act, Trustee Act and Public Trustee Act and Regulations.

JOB DUTIES AND TASKS

1. Examines the nature and extent of estates of deceased persons
 - a. reviews assigned files for estates that do not include real estate, personal business, complex securities, legal action or no readily apparent heir and determines jurisdiction according to relevant acts and regional boundaries
 - b. refers to the supervisor those files that require more detailed administration
 - c. determines appropriate funeral services based on religious, cultural and economic considerations, balancing the wishes of the deceased, next-of-kin, family and friends and authorizes payment for services
 - d. searches for and contacts interested parties such as heirs, beneficiaries and creditors and gathers information or notifies parties who may have rights to petition a court to vary the terms of a will and validates will claims
 - e. instructs staff or agents to secure and safeguard assets such as real property, vehicles and personal effects and reviews written reports of assets located and investigations undertaken
 - f. goes through personal effects of deceased persons to locate information about family members and financial matters
 - g. compiles comprehensive inventories of clients' assets and liabilities from information obtained through personal effects, investigations by agents, financial institutions, contacts and tax returns
2. Administers the affairs of estates of deceased persons to maximize value
 - a. compiles information on assets and liabilities and drafts applications for Grant of Letters of Administration, Grant of Letters Probate, "Notice of No Grant" or other Grants, as appropriate
 - b. instructs the advertising clerk to advertise for creditors
 - c. requests lien searches for assets such as with vehicles, mobile homes and companies registries
 - d. determines the size and nature of debts owed and initiates and authorizes payment to creditors
 - e. compiles information for preparation of tax returns by accountants
 - f. instructs staff, agents or custodians to photograph, dispose of or store vehicles, other personal property and personal effects
 - g. instructs jewellery and other custodians or agents to dispose of jewellery and other assets either by sale or distribution in kind to beneficiaries or heirs
 - h. makes interim disbursement payments to clients dependent on estate for funds
 - i. prepares Release and Indemnity documentation, Affidavits of Witness and letters of instruction to beneficiaries or heirs for approval of the estate trust accounting and proposed distribution
 - j. takes actions to maximize economic advantage of assets such as reviewing asset portfolios with financial advisors and determining appropriate disposition of term deposits
 - k. establishes proof of heirship in accordance with approved policies and procedures and ascertains the requirements for proof where the standard required documentation is not available
 - l. performs final review of files to ensure assets have been accounted for and all tax requirements, debts, claims and administrative expenses have been paid and drafts appropriate documentation such as letters to beneficiaries and heirs and Statements of Accounting and Distribution
 - m. calculates and collects appropriate fees, commissions and expenses payable to the Public Trustee
3. Performs other related duties
 - a. responds to inquiries from legal offices, government staff and the public relating to services provided by the Office of the Public Trustee
 - b. maintains personal and financial client files, Wills Index, manuals and library
 - c. prepares forms to transfer files to Inactive Status if heirs or beneficiaries cannot be located

ORGANIZATION CHART
Benchmark Job #006



REASON FOR CLASSIFICATION

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Job Title: Estate Officer

FACTOR NO.	REASON FOR CLASSIFICATION	DEGREE	CLASS. POINTS
1	<p>JOB KNOWLEDGE Understand the goals and objectives of estate administration and related legislation such as the Estate Administration Act, Wills Act and Public Trustee Act to administer the affairs of estates of deceased persons to maximize value and minimize risk.</p>	F	190
2	<p>MENTAL DEMANDS 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.</p>	E	150
3	<p>INTERPERSONAL COMMUNICATION SKILLS Discretion required to exchange information needing explanation of inheritance laws, rights and estate settlements with estate heirs and beneficiaries.</p>	C	30
4	<p>PHYSICAL COORDINATION AND DEXTERITY Moderate coordination and dexterity required to use a computer to estimate costs and values of estates and draft various documents with a some requirement for speed to meet deadlines.</p>	C	15
5	<p>RESPONSIBILITY FOR WORK ASSIGNMENTS Guided by general procedures or instructions, selects alternative course of action to administer the affairs of estates, compile information on assets and liabilities, locate beneficiaries, validate claims and dispose assets and liabilities.</p>	D	75
6	<p>RESPONSIBILITY FOR FINANCIAL RESOURCES Significant financial responsibility to administer estates held in trust to maximize value, including disposing of assets, paying expenses and providing final account balances to heirs and beneficiaries.</p>	E	33
7	<p>RESPONSIBILITY FOR PHYSICAL ASSETS/INFORMATION Significant responsibility to control the personal assets of deceased persons that are held in trust by instructing staff or agents to dispose or store assets.</p>	D	22.5

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FACTOR NO.	REASON FOR CLASSIFICATION	DEGREE	CLASS. POINTS
8	RESPONSIBILITY FOR HUMAN RESOURCES Limited responsibility for human resources to provide informal work instructions to office support staff.	A	5
9	RESPONSIBILITY FOR WELL BEING/SAFETY OF OTHERS Moderate care and attention to make interim disbursement payments to clients dependent on estate for funds.	C	15
10	SENSORY EFFORT/MULTIPLE DEMANDS Focused attention to detail to frequently visually focus on legal documents and personal papers.	C	12
11	PHYSICAL EFFORT Moderate physical effort to frequently focus visual attention on legal documents and personal papers.	C	12
12	SURROUNDINGS Exposure to regular unpleasant dealings with angry or upset heirs, beneficiaries, family members, creditors and landlords regarding estate funds.	B	4
13	HAZARDS Moderate exposure to hazards from regularly handling personal effects of deceased persons that may contain parasitic insects, rodent droppings or body fluids.	C	6

Total Points: 569.5

Level: Range 15