

Job Class Profile: Estates Officer I**Pay Level: CG-27 Point Band: 534-577**

Factor	Knowledge	Interpersonal Skills	Physical Effort	Concentration	Complexity	Accountability & Decision Making	Impact	Development and Leadership	Environmental Working Conditions	Total Points
Rating	3	4	3	4	3	4	4	1	3	
Points	140	67	19	19	90	87	83	21	32	558

JOB SUMMARY

The Estates Officer I performs administrative and investigative work in the Estates Division of the Supreme Court and for less complex deceased and/or mentally incompetent estates, and may administer estates of guardianship of minors.

Key and Periodic Activities:

- Ascertains all assets and liabilities of estates and prepares inventory.
- Prepares letters of affidavits and various other legal estate documents.
- Disburses funds from guardianship account; completes variety of forms; obtains signatures; maintains ledgers and journals; calculates interest and commissions; issues cheques from patient trust accounts; receives/stores for safekeeping and releases personal affects of patients; files income and estate tax forms and returns; maintains individual accounts and bank pass books; prepares brief reports to the Estates/Trust Administrator regarding status of accounts; post entries, receipts and disbursements; prepares monthly maintenance checks for minors and patients; keeps records of investments and prepares financial statements.
- Approves payments to beneficiaries or hospitals for maintenance of patients and their comforts and for the maintenance and education of minors whose funds are held in trust.
- Sets amount of fees to be charged against each estate administered; invests estates funds for estates handled in order to obtain highest yield.
- Winds-up estates and closes files after final distribution of deceased estates, or return of estates to discharged mentally incompetent patients.
- Performs related work as required.

SKILL**Knowledge****General and Specific Knowledge:**

- General knowledge of estates and trust administration, applicable acts and policies, basic accounting principles, and income tax.

Formal Education and/or Certification(s):

- Minimum: High School Diploma supplemented by courses in accounting and/or trust/estate

administration.

Years of Experience:

- Minimum: 2-3 years of experience.

Competencies:

- Strong interpersonal, communication, organizational, problem solving, and analytical skills.

Interpersonal Skills

- A range of interpersonal skills are used to listen and give advice to stakeholders and clients regarding a variety of estate related issues; ask questions to gather information; gain the cooperation of others to complete work; address issues and/or solve problems; deal with upset or angry people; conduct formal interviews; provide care and nurture others; and resolve disputes between people.
- Communication occurs with co-workers, supervisor, clients, beneficiaries and creditors.
- The most significant and frequent contacts are with coworkers and supervisor to discuss complicated estate issues; and with clients to address their inquiries, problem management, and complaints and accusations.
- Examples of the use of interpersonal/communications skills: Dealing with clients/beneficiaries/creditors which are in disagreement with how the estate is being administered. Explanation or elaboration of technical information is often required.

EFFORT

Physical Effort

- The demands of the job do not result in considerable fatigue, requiring periods of rest.
- There is a requirement to lift objects less than 10 lbs but may lift objects from 10 – 25 lbs.
- Use of gross motor skills is required when driving.
- Fine finger precision work occurs while using a computer.
- Sitting, standing, walking, and sustaining awkward/cramped body postures/movements while inventorying a house/garage/shed which requires lifting/moving/loading household items; retrieving files stored in boxes; crawling under houses (crawl spaces); and transporting garbage to the dump.

Concentration

- **Visual** alertness occurs while staring at a computer screen, ensuring accuracy in disbursements, court documents, deeds, etc., and trouble shooting within an estate.
- **Auditory** concentration while dealing with clients/beneficiaries to focus on what they are saying.
- **Repetition** requiring alertness happens when calculating administration fees,
- **Time pressures/deadlines/interruptions** occurs as a result of tax return deadlines, real estate sales.
- **Exact results and precision** occurs when performing precise calculation of statement for payout purposes.

Complexity

- Work tasks vary but generally challenges/problems/issues may have obvious solutions or may

be addressed by following procedures or guidelines.

- When addressing typical challenges/problems/issues, can refer to acts such as the Mentally Disabled Persons Estates Act, Intestate Succession Act, The Income Tax Act, Act Pertaining to Minors, and other acts/regulations/procedures. May seek advice and guidance from coworkers, Estates Officer II, Accountant, or the Estate Trust Administrator.

RESPONSIBILITY

Accountability and Decision-Making

- Work tasks are monitored and controlled.
- Responsible for administering less complex estate cases and may administer estates for the guardianship of minors. Becomes more familiar with the work, estates with more difficult administrative problems may be assigned. Consults with the supervisor on difficult problems but make final decisions on routine estate procedures. Work is subject to review by supervisor.

Impact

- Generally has impact on the immediate work area, department, within the organization, and on clients/general public. Additionally, impacts are felt directly on processes and systems, information, and finances.
- The most significant impacts are on clients (general public).
- Can have a direct impact on client's finances and property. Errors could result in significant impact on client finances however this is mitigated through supervisory review of work completed.
- Work must be in compliance with procedures, acts and regulations.
- Consequences and/or errors are normally identified and resolved within hours of identification.

Development and Leadership of Others

- There is no supervision of staff.
- May provide guidance or advice to new employees.

WORKING CONDITIONS

Environmental Working Conditions

- Safety precautions/equipment are occasionally required depending on situation such as ensuring repairs to an estate property are completed which may require gloves, mask, disposable coveralls.
- Limited likelihood of minor cuts, bruises, abrasions or minor illnesses. No likelihood of fractures, injury or occupational illness resulting in partial or total disability.
- Occasional exposure to dirt/dust/filth/garbage, computer glare, distracting noise in office environment.