

ESTATES OFFICER 1

GENERAL

This is responsible work under the authority of The Mental Health Act involving liaison between the office of the Administrator of Estates and any persons involved with the estates of patients placed under administration. An incumbent in this class works under the general supervision of the Administrator carrying out detailed inspections of estates and is responsible for the maintenance of all pertinent records.

TYPICAL DUTIES

- Conducts complete detailed inspections of estates, including interviews and legal searches, and prepares a complete report on each inspection.
- In the course of his inspections, interprets The Mental Health Act as it applies to the estates of mentally disordered persons.
- Has close contact with persons involved with the estates including relatives, clergy and legal, medical and business people in the course of an investigation.
- Prepares applications for Old Age Security, Blind Persons' Disability and other pensions and social allowances, securing all necessary related documentation.
- Performs other related duties as assigned.

QUALIFICATIONS

Knowledge, Abilities and Skills

- Good working knowledge of The Mental Health Act as it applies to the estates of mentally disordered persons and the ability to interpret same where necessary in the course of an inspection.
- Good general knowledge of assessment standards and practices and the ability to evaluate rural or urban properties for rental, sale or insurance purposes.
- Ability to deal effectively with all persons involved with an estate in the course of an investigation.
- Ability to communicate effectively both orally and in writing.
- Must be bondable.

Education, Training and Experience

Minimum of Grade XI with some knowledge or experience in property assessment desired, and successful experience in dealing with the public.

“This information is available in alternate forms upon request.”

Physical Standards

Physically capable of performing the duties assigned.

ESTATES OFFICER 2

GENERAL

At this level an incumbent will be responsible for performing the duties of estates investigator as well as being responsible to completely administer a number of small estates of a simple nature where the assets of the estate will usually be confined to cash and/or chattels.

TYPICAL DUTIES

- Estates Investigation
- Under the direction of senior estates administrators the incumbent will ascertain the financial status of an estate.
- Conducts interviews of relatives, neighbours, employers, etc.
- Prepares detailed inventories.
- Takes possession and control of movable items from the premises.
- Obtains appraisals for personal property and arranges for sale or disposal.
- Attends at banks or trust companies to list contents of safety deposit boxes and to remove contents.

- Estates Administration
- Responsible for general administration of estates of an uncomplicated nature under the direction of a Senior Trust Officer.
- Checks and acknowledges financial statements submitted by next of kin.
- Extensive correspondence and/or personal contact with patients, next of kin on estate matters.
- Arranges for recording and approval of property, machinery, vehicles and chattels.
- Makes applications for Life, Group, Health and Accident Insurance benefits, Old Age Security and Canada Pension Plan payments.
- Approves payment of expenses incurred by the estate.
- Performs other related duties as assigned.

QUALIFICATIONS

Knowledge, Abilities and Skills

- General business knowledge.
- Knowledge of legal terminology.
- Working knowledge of The Mental Health Act as it applies to the estates of mentally disordered persons and the ability to interpret same.
- General knowledge of assessment standards and practices.

Education, Training and Experience

Several years of general business experience or legal secretarial experience involving trust fund administration or two years' experience in estates investigation.

ESTATES OFFICER 3

GENERAL

This is estates administration work in the Office of the Public Trustee. Employees at this level are assigned a full caseload of estates and will be responsible for the detailed administration of assigned estates in either the deceased person section or the mental health sections. An officer of this class is capable of handling estates independently, making decisions, and taking appropriate actions in accordance with general policy, precedent, governing acts and rules of court. Officers of this class may consult with staff solicitors and senior estates officers about vital estate matters. Work is assigned and reviewed by senior officers.

TYPICAL DUTIES

- Prepares applications for Orders-in-Council granting the Public Trustee authority to administer estates of mentally incompetent persons.
- Prepares applications to Surrogate Court for letters of administration and related documents to become Administrator of the Estate.
- Allocates work to estates inspection staff to obtain estate inventory.
- Examines information submitted to ascertain whether urgent action is necessary for protection of livestock and other assets.

- Interviews creditors, claimants, solicitors, beneficiaries, next of kin and patients whose estates are held in trust.
- Responsible for the management of farm and urban properties, preparation of leases, collection of rentals, payment of taxes, collections and payments under mortgages, agreements for sale, bank loans.
- Arranges for recording and appraisal of properties, machinery, vehicles and chattels.
- Makes application for Life, Group, Health and Accident Insurance, Claims under Fire, Auto Insurance.
- Makes application and collection of various pension benefits such as Canada Pension, Old Age Security, War Veterans Allowance.
- Close liaison with medical and social service staff at Mental Health Centres, Care Services involving resident patients and out-patients.
- Approves payment to beneficiaries, hospitals for maintenance of patients and their comforts and for the maintenance and education of minors whose funds are held in trust.
- Performs other related duties as assigned.

QUALIFICATIONS

Knowledge, Abilities and Skills

- Practical knowledge of legal terminology and practice.
- Working knowledge of statutes related to estates administration.
- Ability to work independently and make decisions under pressure.
- Ability to deal with the mentally ill and relatives.

Education, Training and Experience

Minimum of two years' experience as an Estates Officer 2 with the Public Trustee's Office or similar experience in an administrative capacity in work related to the management of estates.

ESTATES OFFICER 4

GENERAL

This is complex estates administration and supervisory work in the Office of the Public Trustee. Employees at this level will function as Section Head in either the mental health or deceased persons sections.

TYPICAL DUTIES

- Responsible for the direct supervision of estates officers, estates investigators and secretarial support personnel.
- Acts as administrator for complex estates with difficult and highly involved problems; interviews members of the legal profession, members of families etc., outlining the jurisdiction of the Public Trustee and carrying out all of the services therein.
- Acts as resource person for other estates officers by providing assistance and guidance as to proper policy and procedure.
- Assigns workloads and evaluates staff performance.
- Conducts reviews of individual files to ensure adherence to policy and procedures.
- Ensures that maximum security is provided for all the effects of estates.
- Personal attendance in the field to assist estates officers in complicated situations.
- Responsible to the Public Trustee for all phases of estates administration within section.
- Contribute to policy recommendations and procedural changes.
- Performs other related duties as assigned.

QUALIFICATIONS

Knowledge, Abilities and Skills

- Thorough knowledge of statutes relating to estates administration.
- Knowledge of general business practice.
- Ability to organize and supervise support staff.
- Ability to work under pressure.
- Ability to establish reporting system.

Education, Training and Experience

Extensive experience in estates administration.

