Position Description

Role:	Specialised Support Consultant
Business Unit:	Financial Administration
Classification:	Career Level 3
Location:	Footscray / Dandenong / Bendigo
Reporting to:	Team Leader, Specialised Support
Direct Reports:	None

State Trustees

State Trustees is the public trustee for Victoria, providing a vital service for more than 49,000 Victorians in financial year 2018, including more than 11,000 Victorians who, due to mental illness, injury or disability, are unable to independently manage their own financial and/or legal affairs.

Will writing, power of attorney, executor services, trustee services and financial administration are just some of the services State Trustees provides to its clients, while maximising its contribution to the economy and wellbeing of the State of Victoria.

State Trustees is a state-owned company and operates from three offices, Footscray, Dandenong and Bendigo. We employ over 440 people, look after more than $2.26 billion in client assets and last financial year generated more than $72 million in revenue.

At State Trustees, we are passionate about raising awareness and educating the community on issues that impact all Victorians, including the importance of wills and preventing financial elder abuse.

Financial Administration

The Financial Administration Division is responsible for helping clients by providing supportive services to assist them in ensuring financial security, management of legal interests and access to entitled benefits. Financial Administration clients are those Victorians who the Victorian Civil and Administrative Tribunal (VCAT) has determined should have their financial affairs administered by State Trustees. There are currently approximately 9500 VCAT appointed clients. Financial Administration employees are located at Footscray, Dandenong and Bendigo.

The impact you'll have….

As a Specialised Support Consultant, you will develop a comprehensive understanding of your client's complex needs, enabling you to deliver quality service and support, whilst managing their financial a legal affairs in line with the Guardian and Administration Act 1986 and 2019.

Your client base will vary, with each client having complex and unique circumstances, which could further be complicated with multiple critical factors, such as the loss of formal or informal support, mental health concerns and/or disabilities, substance abuse, financial abuse, being at risk from others or demonstrates violent behaviour, at risk accommodation or difficult relations (family breakdowns or conflict) etc.

The client outcomes in situations appear straight forward, however are challenging to achieve due to the complexity of the client situation.

Accountabilities

Accountability	**Key activities to deliver on accountability**
Case management	• Establish an understanding of the complexity of the client and their circumstances, to provide high level professional advice and management of the client's affairs. • Provide guidance and support to both the client and their relevant stakeholders (in line with the clients will & preferences to prevent serious harm). • Provides tailored financial management (including decision making) for each client, including setting and maintaining budgets, payment of bills (in consultation with the client or their support network where possible), negotiating and make financial decisions on competing needs, i.e. affordability, access to services or funds, debt negotiation etc. Or manage the client outcomes where they may not have access to funds, complex assets, or restriction of funds may be required due to abuse (financial and or addiction). • Consults with clients and their support networks in relation to the management of the clients financial and legal affairs • Identify, secure, record and protect the clients' assets, financial entitlements and legal rights. • Assessing clients' suitability and engagement for participation in State Trustees internal financial independence program. • Identifies clients who are appropriate for the Intensive Support Program • Working closely with the Financial Counselling Advisor to gather information regarding community resources and government assistance as required to support clients, and to help build financial capability and literacy of our clients where appropriate • Identifies and manages potential client risks, such as becoming homeless, closure of bank account, violence, and mitigate against any potential escalation • Makes recommendations on Behavioural Management plans for clients where appropriate to ensure both the client and consultant are protected and working to achieve the client outcome. • Identify risks associated with clients' will and preferences where it may cause serious harm • Identify, maintain and record the clients' support networks, or try to connect client with a support network or recommend appointment of a guardian if no support network exists. • Ensuring client support network are adequate in terms of quality and appropriate support and assist to strengthen network where possible • Visits either face to face or remotely to engage with clients and their support networks where required • Comply with legislation, policies, work instructions and service standards

Accountability	Key activities to deliver on accountability
Stakeholder Engagement	• Articulate (both verbal and written) the unique circumstances relevant to each client to a variety of external stakeholders varying from Office of the Public Advocate, Victoria Legal Aid, case workers, medical staff etc, to achieve the ideal outcome for the client. • Create relationships with clients who cannot or may not want to create a relationship with State Trustees, and / or with the other key external stakeholders. • Develops and maintains meaningful communication with clients and their support persons concerning clients' financial and legal circumstances, needs, will and preferences. • Forms meaningful relationship with external stakeholders such as the Department of Health and Human Services, Office of the Public Advocate, residential facilities, support networks to ensure clients receive benefits and services entitled to them, raise concerns about (insert example here i.e., what other reasons does the client reach out to), • Builds and maintains strong relationships with all key internal and external stakeholders in situations where the external stakeholders may have differing viewpoints
Information Management	• Records and maintains all events and communications with clients, support persons, family members and stakeholders in the appropriate systems • Provides clients and their support networks with information on their financial and legal affairs when requested • Identify, maintain and records clients' personal details including the will and preferences for clients. • Provides reports to VCAT in relation to clients' circumstances in accordance with the Guardianship and Administration Act 1986 and 2019 and attends Tribunal hearings both by telephone and in person.

Decision making

Decisions made independently by this position:	• Managing the administration of client financial and legal affairs including making financial decisions in accordance with their will and preference and having considered if the decision will cause 'serious harm.' • Engaging and instructing other areas within Professional Services and Corporate Services to carry out services for clients. • Acting on Internal Service Providers' recommendations • Recommendations to supervisor about how to manage risks
Decisions made after consultation with supervisor:	• Requesting a VCAT hearing • Divestment and disposal of assets above delegated limits • Departing from usual business processes to account for unusual complexity/risk
Decisions referred to supervisor:	• Workflow allocation • Expenditure beyond levels authorised by Client Authorities Policy and Corporate Delegation of Authority

Key communications

Contact / organisation	Purpose of communication
Internal	
Senior Advisor, Senior PFC's, Client and or Corporate Legal	To review and seek direction on issues of legal or regulatory risk
Internal Service Providers	To request specialist advice (tax, financial planning, legal) or support services necessary to meet the specific needs in managing clients' financial and legal affairs
Client Relations Consultants, New Client Team, Financial Administration Consultants, Financial Counselling Advisor	To share information across the team as required to ensure the efficient and full administration of clients' portfolios
External	
VCAT	To seek direction and/or approval for decisions that fall outside of State Trustees' authority when it relates to managing clients' affairs
Centrelink & Department of Veteran Affairs	To obtain and secure client entitlements
Office of the Public Advocate (OPA)	To liaise with OPA guardians appointed under the *Guardianship and Administration Act* to ensure lifestyle decisions are made in accordance with clients' financial circumstances
External Support Services (e.g. case managers, social workers)	To liaise with these services to support clients' financial needs and to assist to determine clients' will and preference
Accommodation Facilities	To liaise with accommodation facilities to establish fees, negotiate accommodation expenses and agreements and maintain appropriate payments
Client's Family and Support Network	To liaise with family and identified support network where required to provide the client with support and to determine will and preferences.

Knowledge, skills and experience requirements

Essential:

- Tertiary qualification in Human Services, Social Services, etc, or equivalent experience
- Demonstrated experience in the human services field coordinating services to meet the needs of client base ranging from those mental health, aged care or disability, substance abuse, etc
- Passionate about making a difference to the lives of Victoria's most vulnerable people
- Sound Financial analytic skills
- Experience creating, managing and modifying budgets and/or being responsible for finances
- Ability to make decisions whilst showing empathy and compassion
- Active listening skills & well-developed professional communication skills (written and spoken)

- Ability to have difficult conversations whilst being sensitive to client needs
- Experience working with complex cases which require significant support.
- Demonstrated ability to prepare commercial standard legal correspondence, reports and recommendations
- Excellent stakeholder engagement skills

Desirable:

- Diploma in financial counselling
- Previous experience working in government departments such as Department of Health and Human Services such as Centrelink
- Experience with mental health first aid, and/or crisis counselling
- Intermediate financial analytic skills
- Extensive experience in personal financial administration
- Knowledge of relevant legislation, particularly the Trustees Act 1958, Guardianship and Administration Act 1986, Guardianship and Administration Act 2019 and State Trustees (State Owned Company) Act 1994