Position Description

Role:	Client Relations Consultant
Business Unit:	Financial Administration
Classification:	Career Level 3
Location:	Footscray / Dandenong / Bendigo
Reporting to:	Team Leader, Client Relations
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….

The Client Relations Consultant is the 'face of State Trustees' for our newly-appointed and existing clients. You will play a critical role in the onboarding of new clients, often through in-person meetings at clients' premises, where you will outline our role as administrator, assess their financial circumstances, uncover their will and preferences and clearly explain how we will support them to meet their needs.

You will also have a strong focus of engaging our existing clients through general and budget reviews and when it's best to discuss a situation face-to-face.

As a Client Relations Consultant, you will also represent State Trustees at VCAT, provide community education and coach and mentor Personal Financial Consultants.

Accountabilities

Accountability	**Key activities to deliver on accountability**
Financial and legal initialisation and management	• Meets with new clients and support persons providing details of the role of an Administrator • Uncovers and documents clients' financial and legal position and will and preferences for onboarding and ongoing management purposes • Completes a Client Engagement Record for clients to ensure comprehensive details of clients' financial and legal circumstances are captured and any urgent activities are actioned and makes recommendations • Identifies and refers clients to the internal Financial Independence Program (FIP)
Contribute to client financial and legal administration	• Undertakes engagement with existing clients through general and budget reviews which may lead to actions including follow-up work, payments and general matters. • Completes an existing Client meeting record r that documents the client's current circumstances, including their will and preferences, and actions client requests as required. • Attends critical VCAT hearings on behalf of State Trustees • Identifies and refers legal matters as required • Follows up with previous administrators and engagement with VCAT following appointment due to non-compliance 'account by administrator' (ABA) • Provides advocacy and support to Intensive Support Program (ISP clients), referring to / engaging appropriate service providers to meet the specific needs of clients and in accordance with legislative requirements, prescribed policies, work instructions and service standards
Stakeholder Engagement	• Communicates with clients and support persons with regard to their financial and legal circumstances • Builds and maintains strong relationships with all key internal and external stakeholders to actively promote and provide information and advice regarding State Trustees, and to act on cross referral opportunities to meet referral targets • Liaises and advocates on client's behalf with key stakeholders including VCAT and the,Office of the Public Advocate (OPA). • Arranges and delivers professional and knowledgeable presentations to stakeholders and the Victorian public about State Trustees and the Administration process to meet stakeholder targets • Mentors and provides guidance and advice to Personal Financial Consultants • Liaises with the NDIS/Support Coordinator to advocate for, and support, clients.
Information Management	• Records all events and communications with clients, family members and stakeholders in the appropriate systems promptly • Provides clients with information on their financial and legal affairs • Records clients' will and preferences

Decision making

Decisions made independently by this position:	• Making financial decisions in the best interest of the clients and in the least restrictive manner • Attending to urgent orders requiring immediate action to secure client assets • Seeking clarification and/or further information from VCAT where required. • Recommendations to Supervisor about how to manage risks
Decisions made after consultation with supervisor:	• Cancelling client visits • Meeting with a client without a third-party present • Conducting presentations and/or community engagement programs • Departing from usual business processes to account for unusual complexity/risk
Decisions referred to supervisor:	• Workflow allocation • Expenditure beyond levels authorised by the State Trustees Client Authorities Policy and Corporate Delegation of Authority

Key communications

Contact / organisation	**Purpose of communication**
Internal	
New Client Team	To provide client information critical to the Onboarding process
Personal Financial Consultants	To make recommendations in relation to managing clients financial and legal affairs and to support future decision making with the collection of relevant documentation and clients' will and preferences
External	
VCAT	To seek direction and/or approval for decisions that fall outside of State Trustees' authority when it relates to managing clients' affairs To provide information about State Trustees products and processes
Office of the Public Advocate (OPA)	To liaise with OPA guardians 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 ensure they have relevant information on decision making ability of State Trustees
General Public	To provide information and advice about Administration and State Trustees products and services including at external events/presentations

Knowledge, skills and experience requirements

Essential:

- Relevant experience in a human services field
- Demonstrated ability to prepare commercial standard correspondence, reports and recommendations
- Active listening and well-developed professional communication and presentation skills
- Well developed relationship management skills including the ability to make connections with diverse clients
- Ability to make decisions and communicate whilst showing empathy and compassion
- Understanding and experience dealing with clients with a disability and/or difficult or sensitive issues
- Excellent stakeholder engagement skills
- Strong focus on client service delivery excellence
- Demonstrated experience in mentoring others
- Proficient in the use of Microsoft Office suite
- Highly motivated self-starter who can work independently and remotely and also work effectively in a team environment
- Current Victorian driver licence

Desirable:

- Tertiary qualification in a human services field
- Experience creating and managing budgets and/or being responsible for finances
- Knowledge of relevant legislation, particularly the Trustees Act 1958, Guardianship and Administration Act 1986 and 2019 and State Trustees (State Owned Company) Act 1994