



# Bequest Assist

Posted: 15 July 2021

## **JOB TITLE:**

BEQUEST ADMINISTRATOR

## **JOB DESCRIPTION:**

Bequest Assist is an innovative, fast growing business that helps charities collect their bequest gifts. In this role, you will learn new skills, problem solve with support, and help a diverse range of charities.

As a Bequest Administrator, you will join a small team that closely monitors estate administration progress for multiple charities. We work to ensure that all Gifts in Wills are received as efficiently and cost effectively as possible maximising the money going to the charity.

This role is 3-4 days per week with room to expand in the future. We have a preference for a person located in either the Melbourne, VIC or Bundaberg, QLD areas.

## **KEY RESPONSIBILITIES:**

- Work with our custom-built software (Salesforce platform) to capture all available data on new estates.
- Monitor estates for progress including requesting updates from solicitors, communicating with the charity recipient and following our step-by-step process.
- Help new charities use our software so that they can better manage their estates.
- Assist with development of innovative strategies to inform the bequest sector on best practices in estate administration.
- Coordinate estate analysis reports to assist clients in understanding their historical bequest landscape.

## **SKILLS & ATTRIBUTES:**

- Enthusiasm for helping charities do their good work effectively and efficiently.
- Advanced Microsoft Excel (pivot tables, data migration)
- Experienced in management of data and CRM use, preferably Salesforce
- Confident making phone calls, including to solicitors
- High level communication skills, both written and verbal
- Strong problem solver, able to understand complex issues
- Confident, mature, enthusiastic and resilient
- Eye for details and driven to accuracy
- Able to maintain a high level of data security and privacy
- Be a team player with the ability to collaborate

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**Bequest Assist Pty Ltd.**

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**Telephone:** 0425 780 456

**Email:** [info@bequestassist.com.au](mailto:info@bequestassist.com.au)

**Website:** [www.bequestassist.com.au](http://www.bequestassist.com.au)



# Bequest Assist

## HOW TO APPLY:

Please include in your application:

- Your current resume with details of your work experience and relevant information to this position
- A short statement of no more than one (1) page, focusing on your knowledge, skills and attributes, including how you have used Excel or Salesforce in previous roles
- When you would be available to take on a new role

Please apply as soon as possible as applications will be reviewed on an immediate basis.

For any questions please contact Maureen on 0425 780 456 or email [maureen@bequestassist.com.au](mailto:maureen@bequestassist.com.au), using the subject line: **Ethical Job Application**.

The successful candidate will have access to the following:

- Career development opportunities
- Work from home support
- Work/life balance through semi-flexible working hours

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