State Trustees
For all Victorians

Position Description

Role:	Senior Consultant, Legal Support
Business Unit:	Financial Administration
Classification:	State Trustees Level 5
Location:	Footscray / Dandenong / Bendigo
Reporting to:	Team Leader, Financial Administration
Direct Reports:	None

State Trustees

State Trustees is Victoria's public trustee providing a vital service for 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 for 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. At State Trustees, we are passionate about raising awareness and educating the community on issues that affect all Victorians, including the importance of wills and preventing financial elder abuse.

Financial Administration

Financial Administration 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.

The impact you'll have....

The Senior Consultant, Legal Support position manages the legal and complex client issues for a portfolio of clients who no longer have the capacity to manage their own affairs, where a legal, complex or highly sensitive matter requires resolution. Core issues include the management and resolution of alleged financial elder abuse, crimes compensation, TAC and TFM claims, family law matters and property disputes.

Accountabilities

Accountability	**Key activities to deliver on accountability**
Managing legal and complex client matters	• Manages legal and complex client circumstances and/or requirements, including those with extensive shareholdings, business, or family conflicts. • Identifies the legal rights of clients and initiates legal proceeding where necessary ensuring the clients best interests are upheld. • Completes complex and extensive reconciliations of bank accounts/other financial assets, Reviewing Trust and Estate documents. • Management of farms and complex financial/business affairs including obtaining and reviewing lease documents, business documents, Self-Managed Super Funds (SMSF) and Deeds. • Making applications to VCAT pursuant to EPOA Act and Guardianship and Administration Act 2019 for compensation independent of legal assistance. • Ensures all legal matters are proactively progressed and documented.
Clients' financial and legal management	• Makes financial decisions on behalf of clients in accordance withlegislative requirements, prescribed policies, work instructions and service standards. • Consults with clients in relation to the management of their financial and legal affairs where appropriate. • Develops and manage client's budgets including approving payments. • Secures clients' legal entitlements (financial or otherwise). • Identifies and protect the clients' assets and legal rights. • Attends VCAT hearings on behalf of State Trustees for matters that involve a current legal issue.
Stakeholder Engagement	• Maintains meaningful communication with clients and their support persons in regard to their financial and legal circumstances and in consideration of their will and preference. • Liaises with internal and external stakeholders (e.g. client legal, external solicitors, Office ofthe Public Advocate) to ensure clients receive benefits and services they are entitled to including briefing external solicitors in respect to legal issue matters. • Builds and maintains strong relationships with all key internal andexternal stakeholders. • Mentors and provides guidance and advice to Personal Financial Consultants.
Information Management	• Provides reports to VCAT in relation to clients' circumstances inaccordance with the Guardianship and Administration Act 1986 and 2019. • Provides information for relevant reports in relation to ongoing legal matters as demonstrated in file reviews. • Records all events and communications with clients, family members and stakeholders in the appropriate systems. • Provides clients with information on their financial and legal affairswhen requested.

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 to carry out services for clients. • Acting on Internal Service Provider's recommendations
Decisions made after consultation with supervisor:	• Departing from usual business processes to account for unusual complexity/risk • Engagement with Corporate Legal • Divestment and disposal of assets above delegated limits • Initiating a Subpoena
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	
Client Legal	Joint file management for legal issues being subject to litigation.
Various business unit teams	Receiving or providing information to support the legal issues including conclusion and hand off.
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.
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	To liaise with these services (e.g. case managers, social workers, solicitors, interstate tribunals and bodies) to support clients' financial needs and to assist to determine clients' will and preference.
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 business or accounting or equivalent experience
- Extensive experience in personal financial administration
- Well-developed professional communication skills (written and spoken)
- Demonstrated ability to prepare commercial standard correspondence, reports and recommendations
- Understanding and experience dealing with clients with a disability
- Passionate about making a difference to the lives of Victoria's most vulnerable people
- Sound Financial analytic skills
- Excellent stakeholder engagement skills
- Demonstrated experience in mentoring others
- Basic computer literacy including competent use of Microsoft Office
- Intermediate financial analysis skills

Desirable:

- Tertiary qualification in law or equivalent experience
- 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
- Knowledge of legal proceedings and practices

Key Competencies

Legal literacy and knowledge: Advocating and making applications for client rights, assets and affairs
Financial literacy and numeracy: Apply advanced knowledge of maths and financial concepts
Results orientation/execution: Help others achieve results
Problem solving and decision making: Make complex decisions
Continuous improvement: Lead improvement activities
Influencing and negotiating: Influence and negotiate complex issues
Client focus: Add long term value to clients and stakeholders