POSITION DESCRIPTION

General Information:	
Position Title:	Wills and Estates Specialist (Part-Time)
Incumbent:	New Position
Function & Team/Program:	Gifts in Wills – Fundraising & Communication
Location(s):	Preferably Sydney National Office
Manager's Position Title:	National Manager, Gifts in Wills
Manager's Name:	Jasmine Hooper
Date Prepared:	26 August 2026
Prepared By:	Jasmine Hooper
Approved By:	Louise Woods

Primary Purpose of this Position ***(In one sentence - why does the role exist?)***
The purpose of the Wills and Estate Specialist role is to manage The Smith Family's estate administration portfolio, with particular responsibility for complex, high value and contested estates. The role exists to protect and maximise income from gifts made in Wills by ensuring estate matters are administered efficiently, accurately, ethically and in accordance with legal, regulatory and organisational requirements. The role provides specialist estate administration expertise, manages communication with solicitors, executors, trustees, family members and internal stakeholders, identifies legal and reputational risks, and works closely with the National Manager, Gifts in Wills, Finance and Legal to resolve estate matters in a timely and commercially pragmatic manner.

Scope: Operates in a job share arrangement with shared accountability for outcomes.	
Direct Reports to this Position	**Indirect Reports**
By Position Title	Total Number
• Nil	• Estates Administrator

Financial Dimensions controlled by this Position ***(Include key financial metrics such as revenue growth, income & expense budget, etc)***	
Direct control	**Indirect control**
• Not Applicable	• The role has an important impact on when The Smith Family receives income from gifts left in Wills, how risks are managed, how outstanding estate money is followed up and recovered, and how gifts intended for the charity are protected. • The role manages a national portfolio of complex and contested estate matters, real property, shares, managed funds and other estate assets to ensure gifts in Wills are provided to The Smith Family in a timely

	manner and in accordance with the testators wishes. • To the extent external legal advice is required, the role will be responsible for managing external legal fees for counsel appointed by NM GIW for particular matters

Other Dimensions of this Position
• This is a national role that supports estate administration matters across all Australian states and territories. • The role works across a varied estate portfolio where matters may differ significantly in value, complexity, legal requirements, family circumstances and timeframes. • The role requires regular handling of sensitive, confidential and legally significant information, including Wills, estate records, family correspondence, financial information and personal information. • The role contributes to the integrity and accuracy of estate records, ensuring information is maintained in a way that supports reporting, audit requirements, income forecasting and organisational decision making. • The role requires frequent communication with external legal and estate stakeholders, where professionalism, discretion, persistence and sound judgement are essential. • The role supports consistent and ethical handling of gifts left in Wills, ensuring that The Smith Family's interests are protected while maintaining respectful relationships with families, executors, solicitors and supporters. • The role is also responsible to cover estates administration tasks in the absence of the Estates Administrator

Setting Priorities ***(how is work prioritised)***	
How often does employee prioritise their own work? Eg. Daily, weekly, monthly, annually, other	Daily, weekly, monthly, quarterly and yearly
How often does employee determine the priorities of others?	Not Applicable

Key Relationships ***(Who does the role interact with? List the titles of individuals, departments and organisations frequently interacts with)***	
Internal	• National Manager, Gifts in Wills • Estates Administrator • Gifts in Wills coordinator • Gifts in Wills Relationship Specialist • Head of Fundraising & Communication • General Counsel and Lawyer • Finance team • Group Manager, Individual giving • Philanthropy team • Property team
External	• Estate Administrators • Executors • Trustees • Estate solicitors • Mediators, solicitors and barristers • Bequest Assist

Key Decision Making in this Role: ***(What are the key decisions and recommendations made in this role?)***
Decisions expected, made in collaboration with managers:

• Identifying when an estate matter is simple, complex, high value, sensitive or contested. • Determine the appropriate administration pathway for estate matters. • Determine the information and documents required to assess The Smith Family's entitlement and manage communications with solicitors or executors. • Manage decision making process when an estate matter requires internal escalation to Legal, Finance and Executive.
Recommendations Expected: • Provide recommendations on whether The Smith Family should accept, negotiate, defend or resolve estate claims within delegated authority and subject to legal advice, • Revision of executor commissions and legal fees • Provide recommendations on settlement options in family provision and contested estate matters. • Recommend when to engageexternal legal advisers. • Provide recommendations on estate income forecasting for complex estates • Provide recommendations on risk management for complex estates • Provide recommendations on process improvements to strengthen estate administration, compliance, reporting and stewardship.

Every Team Member at The Smith Family:

- Is expected to uphold The Smith Family Values and Culture;
- Understands and comply with the Child Protection Framework;
- Takes reasonable care for the health and safety of themselves and others;
- Understands and comply with the Workplace, Health and Safety Systems;
- Reports hazards and incidents and participates in risk management as required.

Key Responsibilities / Accountabilities:
Major Area: Estate administration and legal risk management 70 % of Job Total:
Responsible for managing complex and contested estate matters from notification through to final distribution, including reviewing Wills, formal changes or additions to a Will, documents confirming authority to manage the estate, statements of assets and liabilities, executor accounts, distribution statements, correspondence and settlement proposals. Further, responsibilities related to complex and contested estate matters reviewing family provision claims, ambiguous gift clauses, insolvent or partially insolvent estates, missing documents, delays in administration, executor disputes, multiple charitable beneficiaries, life interests, trusts, property, shares and other non-cash assets.
The role is responsible for identifying The Smith Family's entitlement under the Will, assess whether the gift has been correctly interpreted, confirm that estate distributions are accurate, and follow up solicitors and executors to ensure that bequests received from supporters are fully and administered.
This position is responsible for preparing accurate, quality internal briefings to senior stakeholders clearly identifying the facts, issues, risks, financial implications, recommended next steps and stakeholder considerations.
In consultation with the National Manager, Gifts in Wills determine when it is required to engage external solicitors, pro bono advisers, barristers and co beneficiary charities to protect The Smith Family's interests and achieve timely, ethical and commercially sensible outcomes.
The role supports settlement negotiations in contested estate matters in consultation with National Manager, Gifts in Wills, Legal and additional identified stakeholders in accordance with delegated authority.
The position is responsible for contributing to forecasting, by providing accurate updates on expected distributions, likely timing, known risks, claims, delays and settlement prospects.
The role is responsible for maintaining accurate estate records in the donor database and records management systems, ensuring that correspondence, legal documents, decisions, approvals, financial information and stewardship preferences are complete and current.

The role, where necessary, will work with Finance to reconcile estate income, allocate gifts correctly, process non-cash assets, support audit requirements and provide information for reporting.
The role is responsible for providing appropriate information to supporters, members of the public and solicitors about leaving a gift in a Will to The Smith Family, while making clear that The Smith Family cannot provide personal legal, tax or financial advice.
Major Area: Relationship Support, Process Upgrade, Capability Building ***30 % of Job Total:***
The role will often be required to provide respectful and sensitive communication with bereaved families and executors and contribute to donor and family recognition activities where appropriate.
The position is responsible for assisting with identifying improvements to controls and workflows through estate administration procedures and templates.
The role is responsible for supporting internal training on application of income from gifts left in Wills, administration risks, and assist with policy, risk and compliance activities relating to gifts in Wills and estate administration.

Key Challenges in Achieving Goal(s): ***(What are the key challenges faced by this role in meeting goals/objectives)***

- Managing complex and contested estate matters across different Australian jurisdictions, balancing legal, financial, reputational and relationship considerations, and progressing estate matters where the organisation does not control executor timelines or court processes.
- Managing emotionally sensitive communication with bereaved families, executors and supporters while protecting The Smith Family's legal entitlement.
- Managing competing priorities across high value estates, urgent legal matters, income forecasting deadlines and routine administration.
- Effectively work with internal stakeholders who may have different levels of understanding of wills and estate administration.
- Maintain high quality records and evidence trails in matters that may continue for months or years.
- Ensure appropriate boundaries are maintained when providing general information to donors who are considering leaving a gift in their Will

Qualifications, Experience and Competencies: ***(What background, knowledge, experience or competencies are required to perform the role at the expected level?)***

	Essential	Desirable
Education / Qualifications / Memberships:	• Relevant tertiary qualification in law, legal studies, paralegal studies, estate administration, business, fundraising philanthropy or a related field, or equivalent demonstrated experience in estate administration. A tertiary legal qualification is highly regarded	• admission as an Australian legal practitioner, completion of succession law, wills and estates, probate or trusts • Unrestricted practising certificate
	Essential	**Desirable**
Experience:	• substantial experience administering deceased estates, preferably in a legal practice, trustee company, charity, executor services, fundraising,	• Experience in the not-for-profit sector • Experience with charitable bequests, experience briefing lawyers or senior stakeholders

	gifts in Wills or estates environment. • Excellent experience reviewing estate documents, interpreting gift clauses, corresponding with solicitors and executors, • High level of estate management experience at all levels including issues resolution and stakeholder communication to reach resolution. • Outstanding experience maintaining accurate database records, preparing reports, supporting income forecasts and working with internal stakeholders to reconcile estate income.	• Experience working with grieving families or vulnerable supporters • experience with donor recognition or stewardship programs, • Experience using fundraising database
Competencies:	**Essential**	**Desirable**
	• Demonstrated expertise in estate administration, including the ability to interpret Wills, probate documents, estate accounts and legal correspondence; identify legal and compliance risks; exercise sound judgement; undertake risk assessment; and recognise matters requiring legal escalation. • Exceptional communication, negotiation and stakeholder management skills, ability to prepare clear correspondence and briefings, explain complex estate matters in plain language, • High levels of empathy, discretion, confidentiality and resilience, with the ability to navigate bereavement, conflict and sensitive family circumstances professionally and compassionately. • Strong organizational skills, including the ability to manage competing priorities, maintain accurate records, exercise exceptional attention to detail	

	• Commitment to continuous improvement, compliance and ethical fundraising practice,	