

Working Title Public Trustee Representative	Name
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Position Number	Reports to Position No., Class & Level	Division, Branch/Unit Strategic Services Office of the Public Guardian and Trustee (OPGT) – Trust Administration	Ministry Assisted Living and Social Services
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Present Class	Requested Class
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Dept ID	Program Code	Project Code (if applicable)
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PURPOSE: Give a brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization (see Non-Management Job Description Writing Guide [Pages 7-8](#)).

The Office of the Public Guardian and Trustee provides support and services to vulnerable Albertans:

- By protecting and advocating for individuals who are unable to make personal and financial decisions for themselves;
- By providing legal guardianship to represented adults making decisions regarding health care, where to live, with whom to associate, social activities, education, employment and non-financial legal proceedings;
- By administering the property of represented adults, minor children and deceased persons; and
- By providing information, education and support to the public, private guardian and trustees.

OPGT Vision:
Create a province where all Albertans can achieve personal autonomy, live with dignity and maximize their potential. The OPGT will work with others to provide excellent, proactive, timely and respectful service to vulnerable Albertans and all Albertans.

Position Purpose
Reporting to the Supervisor, Trust Administration, the Public Trustee Representative is responsible for the day-to-day administration of a caseload of estates and trusts that may include represented adult, deceased estate, and official guardian files of varying degrees of complexity, financial value and sensitivity. This position is responsible for the protection and administration of the property and financial affairs of represented adults, deceased estates, and minors under the legislated jurisdiction of the OPGT. The OPGT currently serves in excess of 18,000 represented adults, minor children, deceased persons and trusts with assets in excess of \$500 million.

The Public Trustee Representative collaborates with and evaluates recommendations made by multi-disciplinary professional teams consisting of lawyers, tax officers, financial advisors, administrative staff, and other stakeholders, with the members of the team dependent on the needs and circumstances of clients. Discretion is used to protect the dignity and rights of those who are vulnerable when the OPGT is the most appropriate resource to provide support and protection. Work is carried out in compliance with applicable legislation, regulations, policies and procedures.

RESPONSIBILITIES AND ACTIVITIES: The purpose of the job can be broken down in different responsibilities and end results. Each end result shows what the job is accountable for, within what framework and what the added value is. Normally a job has 4-8 core end results. For each end result, approximately 3-6 activities should be described (see Writing Guide [Pages 9-10](#)).

1. Trust Administration
As a member of the Trust Administration Team, provides high quality, client-centric service on represented adult, minor, and deceased estate client files and represents the OPGT in dealing directly with clients, family members,

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internal and external stakeholders and other third parties on Public Trustee client files.

Activities:

- With input and advice from multi-disciplinary team members, determines nature of the Public Trustee's involvement and nature of assets and liabilities to be administered by reviewing information obtained from various sources and conducting on-site investigations, On sight investigations occur, with the Public Trustee Estates Investigator to ensure dual control. These investigations may include long distance travel, some physical labour and locations may contain elements that are deemed hazardous.
- Develops ongoing relationship with clients, family members of clients, internal and external stakeholders, and other third parties with view to understanding and achieving financial and personal outcomes desired by clients.
- Works with multi-disciplinary teams and other division and Ministry representatives to provide high quality, client-centric services.
- Represents the OPT in initial and subsequent meetings and communications with clients, family members, guardians, beneficiaries and other third parties by:
 - scheduling and facilitating meetings with OPGT clients, family members, guardians, beneficiaries and other third parties.
 - contacting OPGT clients, family members, guardians, beneficiaries and other third parties via telephone, email, or other communication methods to provide or gather information.
 - identifying desired financial and personal outcomes for clients through consultation with clients and various parties, with a focus on identifying client strengths and capabilities in identifying those desired outcomes

2. Program Delivery and Administration

Delivers program services in manner consistent with Ministry strategic directions and division and branch operational plans, including leading multi-disciplinary teams in the efficient and effective administration of represented adult, minor, and deceased estate client files in compliance with legislation, policy and procedures.

Activities:

- Collaborates with and evaluates recommendations of highly skilled and client service-oriented multi-disciplinary teams, including lawyers, tax specialists, financial advisors, administrative staff and other stakeholders, to make decisions and support clients.
- Develops comprehensive Client Financial Plans that align with financial and personal outcomes desired by clients and are compliant with applicable statutes, regulations, policies and procedures.
- Analyzes revenues, expenses, investments, liabilities, life events, financial needs, client lifestyle preferences and affordability when developing Client Financial Plans and cash flow analyses.
- Reviews Client Financial Plans with multi-disciplinary team members, revising Plans as appropriate based on input of team members.
- Determines annual budgets that form part of Client Financial Plans by considering client income and expenses and discussing client financial needs with other members of multi-disciplinary teams.
- Reviews and revises Client Financial Plans when required by identifying changes in client circumstances or other factors and information that may impact Plans; recommends adjustments to Plans as appropriate.
- Monitors Client Financial Plans, considering life event and income changes and other client considerations determined through discussions with members of multi-disciplinary teams.
- Manages client assets and investments by considering advice of the Financial Advisor and other members of multi-disciplinary teams in matters related to complex financial transactions (e.g., redemption or retention of securities; sale or management of real estate including farming operations; redemption, retention or conversion of registered investments; operation of and sale of business interests).
- Reviews recommendations about when to redeem or retain non-registered and registered client investments and ensures investments are managed according to Client Financial Plans and redeemed or retained in accordance with provisions of the *Public Trustee Act*.
- Oversees management of client real property by monitoring ongoing life needs of clients and consulting regularly with multi-disciplinary team members and the Financial Advisor to ensure appropriate property insurance is in

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place, proper maintenance of properties, completion of repairs and renovations to properties, timely collection of rental income for properties, and sale or disposition of properties as applicable.

- Identifies estate assets and liabilities and ensures protection and security of assets pending disposition.
- Arranges for the orderly disposition, sale or redemption of estate assets.
- Arranges for verification of estate liabilities, ensuring appropriate supporting documentation, with a view to partial or full payment of those liabilities.
- Identifies and locates legally entitled beneficiaries of deceased estates.
- Accounts to and distributes estate assets to legally entitled beneficiaries.
- Identifies property interests of minors and ensures minors' interests are properly protected.
- Evaluates requests for expenditure of funds on behalf of minors and consults with other members of multi-disciplinary team, where appropriate.
- Accounts to and distributes financial property to former minors as they reach the age of majority.

3. Office of the Public Guardian and Trustee Operations and Program Support

Supports the OPGT in continuous improvement by making recommendations for business process and other improvements, new policies, or amendments to existing policies; serving on internal and external committees; participating in and supporting internal training; and participating in external public speaking engagements.

Activities:

- Monitors business processes for efficiency and effectiveness and makes recommendations for new or existing process improvements to improve efficiency and effectiveness of the OPGT organization.
- Provides suggestions for new policies and procedures or improvements to existing policies or procedures to enhance efficiency and effectiveness of the organization and strengthen internal controls Carries out special project assignments, including considering impacts on client assets and gathering required information.
- Identifies opportunities, develops materials, provides, and evaluates internal training and information sessions pertaining to client property, assets, liabilities, revenue, benefits, or expenses.
- Provides and hosts public education sessions on the role of the Office of the Public Guardian and Trustee, financial and estate planning and other matters of interest within the expertise of the Office of the Public Trustee; provides direction to the Assistant, Trust Administration position in relation to researching and developing materials for public education presentations.
- Represents the Public Trustee in a professional manner to promote and advance the role of the office.
- Participates in public speaking engagements and associated delivery of information.
- Collaborates with business partners and stakeholders to develop and present information regarding estate administration.
- Responds to inquiries from business and professional communities and the public about wills, estates and trusts.
- Develops working relationships with other departments and agencies to address common interests and concerns.
- Assists in peer training of new staff and cover off responsibilities for staff leaves and vacancies.

SCOPE: List specific information that illustrates the challenges, problem solving and creativity requirements and decision making capacity of the position. Also identify the internal or external areas the job impacts (see Writing Guide [Pages 11-12](#)).

The Public Trustee Representative administers and exercises decision-making authority in relation to estates and trusts of varying levels of complexity, financial value, and sensitivity, with responsibility for the protection and administration of property and financial affairs of adults, deceased estates, and minors under the legislated jurisdiction of the OPGT. Issues dealt with are often highly complex and can be emotionally charged, with the Public Trustee Representative interacting directly with clients who often have complex needs and challenges. This position is relied on to resolve situations that can involve multiple opinions and options, sensitive information, and multiple parties in a manner consistent with the desired personal and financial outcomes of clients.

Decisions made by the Public Trustee Representatives significantly impact the client and affected parties, with this position exercising professional judgment and independence in the application and interpretation of applicable legislation,

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regulations, policies and procedures. In addition, the Public Trustee Representative is expected to develop and implement creative and innovative solutions pertaining to program delivery for situations having minimal legislative or policy guidance.

This position communicates with all levels of the business, legal and medical communities, governments, consular officials, law enforcement agencies, clients, other stakeholders and the public in carrying out accountabilities. In addition, the Public Trustee Representative consults and develops effective working relationships with multi-disciplinary teams consisting of lawyers, tax officers, financial advisors, administrative staff and other professional stakeholders that are formed based on the needs of individual clients.

KNOWLEDGE, SKILLS & ABILITIES: Include information on required diplomas and degrees along with identifying the most important knowledge factors, including knowledge about practical procedures, administrative, technical or professional techniques, technical, scientific or program related processes, etc. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (see Writing Guide [Pages 12-14](#)).

The Public Trustee Representative requires thorough knowledge of:

- legislation and common law in relation to the administration of estates belonging to represented adults, deceased individuals (wills, trusts and estates), and minors (e.g., *Public Trustee Act, Adult Guardianship and Trusteeship Act, Minors Property Act*)
- policies and procedures used in the Office of the Public Trustee
- business practices, property management, accounting procedures, and financial benefits available from governments and private sources
- federal and provincial statutes and regulations with respect to the handling and transportation of hazardous goods and firearms;
- training and presentation development and delivery techniques and tools
- government business plan goals, policy directions, structure, and affiliated organizations, particularly as they relate to the OPGT mandate
- Ministry business plan goals, strategic priorities, issues, programs, resources, and legislative frameworks
- the stakeholder community affected by the OPGT mandate, including relevant organizations, committees, advisory groups
- relevant information management and business productivity software

The Public Trustee Representative must have well developed and demonstrated:

- judgment, analytical, problem solving, and decision making skills
- verbal and written communications skills and presentation skills
- interpersonal and relationship management skills to resolve conflict and establish effective relationships with a variety of clients, stakeholders, the public and staff under stressful and sensitive circumstances and facilitate multi-disciplinary teams consisting of lawyers, tax officers, financial advisors, administrative staff and other professional stakeholders
- mediation and negotiation skills
- research and information integration skills, including ability to analyze information from multiple sources and evaluate options and recommendations
- organization and time management skills, including ability to prioritize multiple and competing demands
- commitment to confidentiality, discretion, flexibility, and diplomacy

The Public Trustee Representative must be able to:

- deal effectively with complex and sensitive situations
- interpret legislation and appropriately communicate legislative and legal requirements and processes
- lead and participate in multi-faceted teams, committees, and working groups
- demonstrate high levels of independence and self-management skills with a strong results orientation

- University graduation in a related field plus progressively responsible related experience or a two-year diploma in a

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related field plus progressively responsible related experience.

- Knowledge and experience in the field of estate and trust administration or human services.
- Experience in client-focused program delivery with an emphasis on understanding and meeting the needs of vulnerable clients.
- A valid driver's license is required as travel within the province is required.

CONTACTS: Identify the main contacts the position communicates with and the purpose of the communication (See Writing Guide [Pages 14-15](#)).

This position has contact with:

- clients, family members, internal and external stakeholders, other third parties, and individuals within other government agencies such as Canada Revenue Agency, Canada Pension Plan, Department of Veterans Affairs, Assured Income for the Severely Handicapped, Persons with Developmental Disabilities, etc. to obtain information and explain decisions
- OPGT and Ministry business areas such as Legal, Finance, Tax, Records Management, Audit, etc. to obtain information and coordinate activities
- clients, third parties, and other professionals to discuss specific issues and exchange information, with sensitivity to situations when dealing with individuals who oppose OPGT involvement or are in family crises

Clients	Frequency	Nature and Purpose of Contact
Internal		
Public Trustee	As Required	Strategic direction and alignment
Assistant Public Trustee	Frequent	Complex client case file discussions, performance management issues
Assistant Public Trustee, Business Support Services	Frequent	Resolution of issues between business units
Manager, Trust Administration	Daily	Complex client case file discussions, performance management issues
Manager of Standards, Policy and Quality Assurance	Frequent	Resolution of policy or quality assurance issues
Supervisors, Trust Administration	Daily	Complex client case file discussions, performance management issues
Trust Administration Intake Coordinators	Daily	Complex potential client case discussions
Public Trustee Representatives	Daily	Complex client case file discussions
Assistants, Trust Administration	Daily	Client Service Delivery matters
Financial Advisors	As required	Complex client case file discussions
Investigators	Frequent	Complex client case file discussions
External		
Human Services Organizations	As required	Collaboration to meet needs of vulnerable clients
Clients	As required	Address client case file issues
External Stakeholders	As required	Negotiate special services for OPT clients
Public	As required	Respond to public requests/inquiries/complaints

SUPERVISION EXERCISED: List position numbers, class titles, and working titles of positions directly supervised (see Writing Guide [Page 15](#)).

CHANGES SINCE LAST CLASSIFICATION REVIEW: Identify significant changes, that have impacted the responsibilities assigned to your position since the last review (see Writing Guide [Pages 15-16](#)).

This information is being collected under the authority of Section 10 of the Public Service Act and will be used to allocate positions within a classification plan and to manage the Alberta government human resources program. If you have any questions about the collection of this information, contact the Job Evaluation Unit, 6th Floor, Peace Hills Trust Tower, 10011 - 109 Street, Edmonton, Alberta, T5J 3S8, phone 780/408-8400 or contact your Ministry Human Resource Office.

Signatures

The signatures below indicate that the incumbent, manager and division director/ADM have read, discussed and agreed that the information accurately reflects the work assigned (see Writing Guide [Page 16](#))

Incumbent

_____	_____	_____
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Name

Signature

Date (yyyy/mm/dd)

Supervisor

_____	_____	_____
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Name

Signature

Date (yyyy/mm/dd)

Executive Director

_____	_____	_____
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Name

Signature

Date (yyyy/mm/dd)