

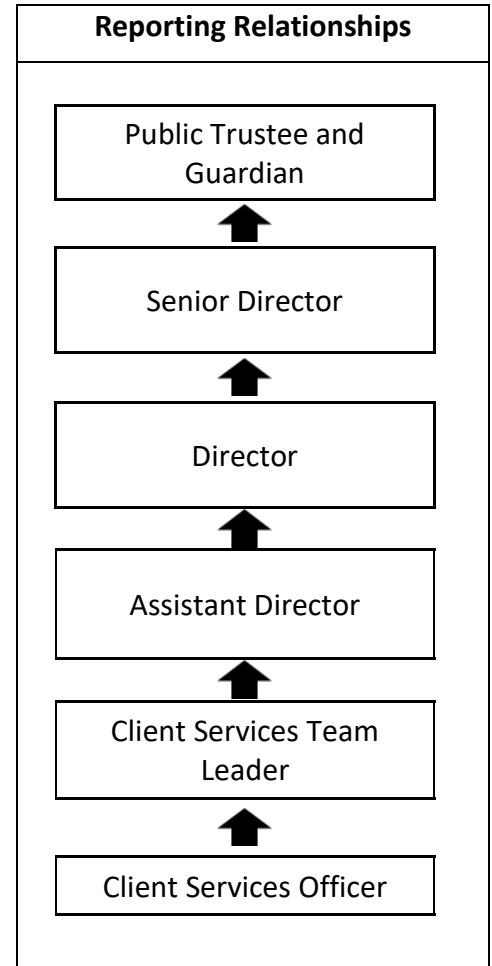


ACT
Government

Justice and Community Safety

POSITION DESCRIPTION

Directorate	Justice and Community Safety
Agency	Public Trustee and Guardian
Position Number	P72243, Several
Position Title	Client Services Officer
Classification	Administrative Service Officer Class 4 (ASO4)
Location	Canberra
Last Reviewed	August 2026



The Australian Capital Territory Public Service (ACTPS) is a values-based organisation where all employees are expected to embody the prescribed core values of respect, integrity, collaboration and innovation, as well as demonstrate the related signature behaviours.

DIRECTORATE OVERVIEW

The Justice and Community Safety Directorate (the Directorate) seeks to maintain a safe, just and resilient and inclusive community.

Our purpose is to continuously improve the wellbeing of our community by delivering responsive justice and community safety services that:

- Maintain the rule of law and support a democratic society;
- Strengthens community safety;
- Protects people's legal and human rights and interests;
- Cares for and supporting people who are at a higher risk of vulnerability;

- Enhances timely access to justice;
- Builds community and business resilience to emergencies and disasters/disruptions; and
- Supports formal partnerships and shared decision making with First Nations Peoples.

We will invest in the capability of our people, and we will support them to deliver innovative and sustainable services for our ACT Community.

We will do this by demonstrating strong public sector values and behaviours; we will be community minded; legal and human rights focussed; inclusive and diverse; passionate about our work and we will listen to and genuinely engage with our stakeholders.

The Directorate advises and supports the following ministerial portfolios:

- Chief Minister
- Attorney-General
- Manager of Government Business
- Minister for Gaming Reform
- Minister for City and Government Services
- Minister for Night-Time Economy
- Minister for Police, Fire and Emergency Services
- Minister for Corrections
- Minister for Women
- Minister for Prevention of Family and Domestic Violence
- Minister for Human Rights

AGENCY OVERVIEW

The Public Trustee and Guardian for the ACT (PTG) is established under the *Public Trustee and Guardian Act 1985*.

PTG aims to promote and support the rights, interests and life decisions of our clients and to deliver excellent trustee outcomes for the ACT community. We perform a range of functions, deliver services under a range of legislation, and work closely with other ACT Government agencies and stakeholders.

PTG promotes our role, services and important life decision information to our clients through:

- Delivery of up-to-date, relevant, accessible information through our website, call team, seminars and specific communication campaigns;
- Our membership of, and contribution to, the Australian Guardianship and Administration Council and its national initiatives;
- Our engagement with the ACT Law Society, relevant elder and estate planning groups, and participation in working groups and boards such as the Official Visitors Board; and
- Specific community events like the National Wills Week, attendance at community group meetings and conferences.

PTG supports our clients' decision making by:

- Performing Guardianship and Financial Management services when appointed by the ACT Civil and Administrative Tribunal (ACAT);
- Acting for clients under a power of attorney when PTG is nominated;
- Supporting Private Managers (individuals appointed by ACAT to manage another person's financial matters) and examining accounts for appropriateness; and
- Providing estate planning services including will and power of attorney drafting.

PTG is the ACT's statutory public trustee. We deliver:

- Estate management services - performing the role of Executor for community members where appointed or where an individual passes away without a will.
- Performing the role of Trustee (or similar):
 - for community members
 - for other ACT Government entities
 - for the Capital Region Community Foundation (Greater Good)
 - under Confiscation of Criminal Assets arrangements
 - for the Unclaimed Monies scheme, and
 - under the Unclaimed Deceased Persons arrangements.
- Investment services – managing funds we hold on trust to ensure value is maintained or improved in line with our fiduciary obligations and informed by our Investment Board.

The PTG is an agency of up to 70 team members and has an annual budget of more than \$10 million. The PTG is a service delivery agency, and our structure comprises a Client Services stream and Enabling and Supporting Services stream. More information on the PTG can be found at www.ptg.act.gov.au.

CLIENT SERVICES

The Client Services stream of PTG brings together all functions of the agency delivering services directly to our clients. This work ranges from initial contact, help and advice, decision making support, and to our role as trustee in administering estates or funds on behalf of the territory.

The PTG aims to deliver high quality client services focused on achieving optimal outcomes for our clients many of whom are vulnerable.

On average the PTG manages over 2,500 clients at any point in time. This number comprises but is not limited to:

- Will and enduring power of attorney drafting
- Deceased estate clients (including beneficiaries)
- Trust clients (clients for whom the PTG provides trustee financial services)
- Clients under guardianship orders

- Clients under management orders (including clients for whom the PTG is appointed financial manager and clients who have a private citizen appointed as their financial manager)
- Clients who have appointed PTG to act as enduring power of attorney
- Clients who have made claims under the Unclaimed Monies Scheme, and
- GreaterGood (individuals and charities the PTG works with to achieve the philanthropic goals of the Capital Region Community Foundation).

POSITION OVERVIEW

Client Service Officers at this level work within one of the sub-teams within the Client Services stream of the agency and will manage a caseload of low to medium complexity clients/matters.

A low to medium complexity caseload can be expected to include clients with:

- Low to moderate value estates/trusts or clients with limited assets and income
- Minimal and/or non-complex decision making required
- Stable and/or non-complex personal circumstances

Client Service Officers will be expected to interact directly with clients, their families, their guardian, carer, support services, beneficiaries, and other authorised third parties as appropriate.

Client Service Officers are required to develop and maintain a sound understanding of the relevant legislation applicable to their role, as well as the business rules and relevant Government policy.

WHAT YOU WILL DO

Under the general direction of the Client Services Team Leader, the Client Services Officer will:

1. Undertake work within an administration team of the PTG to achieve excellent client service outcomes including compliance with relevant law and achievement of PTG performance targets.
2. Manage and monitor own workload in an administration team, escalating client matters as required to the Team Leader.
3. Prepare and maintain accurate records for clients in compliance with the Territory Records Act 2002 and agency procedures.
4. Contribute to a high performance and customer-focussed culture to deliver high quality, innovative and timely client services.
5. Support the Team Leader in achieving business objectives.
6. Make decisions within delegation and exercise accountability for decisions in PTG's functions as required. Make decisions that are legal, empathetic, compassionate and focused on positive client outcomes. All decisions must be made in line with the client's views and wishes wherever possible and client participation in the decisions prioritised.
7. Liaise with key stakeholders, service providers and members of the public, and represent the PTG at events, seminars and presentations, raising awareness and promoting what the PTG does and the importance of the PTG's role.

8. Undertake other duties appropriate to this level of classification which contribute to the operation of the agency.
9. This position does not involve supervision of staff.

WHAT YOU REQUIRE

The following capabilities form the criteria that are required to perform the duties and responsibilities of the position.

Professional / Technical Skills and Knowledge

1. Ability to understand, interpret and apply relevant legislation, government policies and protocols including delivering and monitoring client service needs.
2. Sound written and oral communication skills including ability to prepare written correspondence, including advice, reports and submissions and general correspondence.
3. Ability to contribute to the work of the team in fulfilling objectives and achieving goals and monitor own workload.

Behavioural Capabilities

1. Ability to be professional and organisational skills, including the ability to work under pressure, make appropriate decisions on client matters and balance competing priorities and meet deadlines.
2. Ability to develop and maintain effective relationships with a wide range of clients and internal and external stakeholders, including the ability to provide services to a diverse range of people.
3. Ability to be self-aware and resilient to changing circumstances with ability to consistently display commitment to ACTPS Values and Signature Behaviours.

Compliance Requirements/Qualifications

1. Class C Driver's licence preferred.
2. This position requires ACTPS background / police check.
3. To be eligible for permanent or temporary employment within the ACT Public Service (ACTPS) you must be an Australian citizen, a permanent resident or hold a valid work visa.
4. If an officer no longer holds a visa that permits them to work in Australia, their employment with the ACT Public Service (ACTPS) will be terminated.
5. This position requires a Working with Vulnerable People (WwVP) registration issued by the ACT Government.

WORK ENVIRONMENT DESCRIPTION

The following work environment description outlines the inherent requirements of the role of Client Services Officer (P72243, several) and indicates how frequently each of these requirements would be performed. Please note that ACTPS is committed to providing reasonable adjustment and ensuring all individuals have equal opportunities in the workplace.

ADMINISTRATIVE	FREQUENCY
Telephone use	Frequently
General computer use	Frequently
Extensive keying/data entry	Frequently
Graphical/analytical based	Occasionally
Sitting at a desk	Frequently
Standing for long periods	Occasionally
Designated workstation – This position is an activity based work environment	Never

STANDARD HOURS	FREQUENCY
Flexible working hours (access to flex time)	Frequently
Fixed or specified start/finish times	Occasionally
Expected to work extensive hours over a significant period due to the nature of the duties	Never
Access to Accrued Days Off (ADOs)	Never
Peaks and troughs	Occasionally
Frequent overtime	Never
Rostered shift work	Never

SOCIAL DEMANDS	FREQUENCY
Work with others towards shared goals in a team environment	Frequently
Work in isolation from other staff (remote supervision)	Occasionally
Working in a call centre environment	Occasionally
Working directly with the public	Frequently

PHYSICAL DEMANDS	FREQUENCY
Distance walking (large buildings or inter-building transit)	Occasionally
Working outdoors	Occasionally

MANUAL HANDLING	FREQUENCY
Lifting 0 – 5kg	Occasionally
Lifting 5 – 10kg	Occasionally
Lifting 10kg+	Never
Climbing	Never
Reaching	Occasionally
Bending/squatting	Occasionally
Push/pull	Never
Sequential repetitive movements in a short amount of time	Never

TRAVEL	FREQUENCY
Frequent travel – multiple work sites	Occasionally
Frequent travel – driving	Occasionally
Frequent travel – interstate	Never

SPECIFIC HAZARDS	FREQUENCY
Working at heights	Occasionally
Exposure to extreme temperatures	Never
Operation of heavy machinery e.g. forklift	Never
Confined spaces	Occasionally
Excessive noise	Never
Low lighting	Occasionally
Handling of dangerous goods/equipment	Never
Working with asbestos	Never

Potential to encounter agitated customers	Occasionally
Exposure to potentially distressing case material	Occasionally

OTHER	FREQUENCY
Uniform required	Never
Personal Protective Equipment (PPE) required	Occasionally