Government of
Northwest Territories

IDENTIFICATION

Department	Position Title	
Justice	Relief Public Office Trustee	
Position Number	**Community**	**Division/Region**
82-15643	Yellowknife	Public Trustee/HQ

PURPOSE OF THE POSITION

This position, under the direction of the Public Trustee, administers the estates of deceased persons, and trusts for children and mentally incapable persons. The incumbent is also responsible for monitoring the financial recording of transactions, including the monthly bank reconciliation in the Public Trustee Common Fund to ensure all transactions are properly recorded. This fund consists of over five million dollars of private funds for the estates of deceased persons, minor children, missing persons and mentally incompetent persons. The number of transactions in this fund, including interest posting, can be more than six thousand in an average year.

SCOPE

The position is located in Yellowknife but serves the general public throughout the Northwest Territories. The variety and complexity of matters dealt is extensive. The incumbent must interact not only with members of the public throughout the NWT, but with many other federal and provincial government offices across Canada. The incumbent must interpret various legislation, policies and procedures and apply that knowledge in the administration of estates and trusts, as well as explain their interpretation to clients, other staff, and on occasion, members of the public. The impact of not ensuring that matters are dealt with correctly or processed in a timely manner could have serious implications for the office of the Public Trustee and its clients.

RESPONSIBILITIES

1. **Administer estates of deceased persons;**

- Reviewing information on estate files in order to determine the beneficiaries of an estate;
- Corresponding, and speaking, with relatives and beneficiaries to advise of estate administration issues and request further information on assets and liabilities as required;
- Corresponding with banks, utility providers, credit agencies, territorial and federal government offices, and others to obtain detailed information on assets and liabilities;
- Communicating with relatives regarding the transfer of real property on estates;
- Preparing land transfers and lease transfers for real estate;
- Communicating with mortgagors (usually banks or government agencies) regarding payment of outstanding mortgages;
- Preparing and filing income tax returns for deceased persons;
- Preparing and filing estate trust tax returns; and applications for clearance certificates;
- Authorizing disbursements for the payment of debts on an estate, or for the payment of funds due to estate beneficiaries;
- Selling and/or transferring assets such as snowmobiles, guns, vehicles, jewelry;
- Reviewing an estate file to determine whether it is necessary to apply for letters of administration, or letters probate, or estate closing orders;
- Searching for documentation of land ownership at the Land Titles Office, the GNWT, Band Offices, or any other location as required;
- Maintaining a Firearms' Acquisition Certificate in order to store and transfer guns;
- Attending at the residence of a deceased person to inventory and secure assets;
- Calculating estate administration fees;
- Contacting and corresponding with the Department of Indian Affairs and members of the public, when an estate is going to be administered by the Public Trustee under a transfer of jurisdiction;
- Drafting bills of sale, as may be required for various items in an estate.

2. **Administer trusts for minor children persons;**
    - Authorizing the opening of a trust file when funds are received on behalf of a child;
    - Confirming identity and birth date of a child, as well as identification of their parent or custodian;
    - Applying for Canada Pension Plan, Superannuation, or other benefits for a child where required;
    - Preparing trust tax returns and tax slips on a child's trust as required;
    - Preparing accountings of funds held in trust for children and providing them to the parents or custodians of the child;
    - Calculating various administration fees for services provided on a child's trust;
    - Calculating and authorizing final disbursements to a child from the trust upon the child reaching the age of majority;
    - Authorizing disbursements for the maintenance and education of a child as required.

3. **Administer trusts for mentally incapable persons;**
    - Authorizing the opening of a trust file when a court order is received and on behalf of a mentally incapable person;
    - Preparing trust tax returns and tax slips on the trust as required;

- Confirming identity and birth date of a mentally incapable person, as well as identification of their parent or custodian;
- Applying for Canada Pension Plan, Old Age Security, Superannuation or other benefits for a mentally incapable person where required;
- Preparing income tax returns for a mentally incapable person as required;
- Preparing accountings of funds held in trust for mentally incapable person and providing them to the guardian of the mentally incapable person;
- Calculating administration fees for services provided on a mentally incapable person's trust;
- Calculating and preparing final disbursements to and from the trust for a mentally incapable person when that person dies;
- Authorizing disbursements for the maintenance of a mentally incapable person as required;
- Attending at the residence of a mentally incapable person to inventory and secure assets.

4. **Oversees financial transactions and records for the Public Trustee Common Fund:**
   - Reviewing the monthly bank reconciliation, month-end statements, and a variety of accounting reports as required and set out in the Public Trustee Information System Manual;
   - Co-signing cheques;
   - Reviewing and authorizing the data for interest earned by the Common Fund;
   - Communicating with the government of the NWT and the bank regarding errors and discrepancies regarding the interest earned by the Common Fund;
   - Calculating the monthly interest to be paid to the trusts that make up the Common Fund;
   - Posting the interest to trust accounts that make up the Common Fund;
   - Reviewing and authorizing the data for interest earned by the Common Fund;
   - Reviewing disbursement authorizations and printing cheques for those disbursements;
   - Reviewing the insurance on client's personal assets by determining appropriate policy coverage category and assigning insurance code to the asset;
   - Reconciling the client access spreadsheet for insurance premium calculations on a semi-annual basis;
   - Enters data as required in the Computrust Accounting program in order to review and protect client assets;
   - Calculate the fees for the management of the Common Fund.

5. **Supervises the Senior Finance Clerk;**
   - Reviewing the data entered by the Senior Finance Clerk by means of printed reports for financial and inventory transactions;
   - Assigning work on estate and trust files for the Senior Finance Clerk;
   - Provide direction to the Legal Assistant on work that is done by the Legal Assistant for the incumbent.

6. **Interacts with clients, government staff and the general public;**

- Holds an appointment as a Notary Public for the purposes of accepting sworn statements from clients, co-workers and processing legal documents;
- Responding to information requests on estate and trust files from clients and creditors, either by phone, in writing, or in person at the office;
- Assisting the auditors with the investigation of client file transactions for preparation of the annual audit report.

WORKING CONDITIONS

Physical Demands

Keyboarding, photocopying, filing. Itemizing, handling and packaging personalized inventory for deceased persons, mentally incapable persons and missing persons

Environmental Conditions

Trips outside of office to banks and other institutions. Conditions typically associated with an office environment (florescent lighting, air quality)

Sensory Demands

Concentration when preparing items for data entry and when keyboarding to ensure accuracy. Must be alert and attentive to details. Viewing a computer screen.

Mental Demands

Emotional stress of difficult situations with clients. High concentration and dealing with strict financial deadlines.

KNOWLEDGE, SKILLS AND ABILITIES

- Ability to understand and *interpret estate and financial legislation and regulations, including knowledge of the Public Trustee Act, the Intestate Succession Act, Wills Act, the Probate Rules, the Indian Act, the Income Tax Act, Land Titles Act, Guardianship and Trusteeship Act* and other relevant legislation;
- Ability to deal with the public on matters which are highly personal and sensitive;
- Ability to manage complex financial accounts;
- Proficient organizational, clerical and keyboarding skills in addition to proficient verbal and written communication abilities are essential as the position deals extensively with the public sector and other government and banking institutions;
- Knowledge of Microsoft Excel and Word;
- Knowledge of trust accounting and Income Tax programs;
- Knowledge of generally accepted accounting principles and bookkeeping procedures in order to interpret and process financial documents
- Knowledge of procedures of personal and real property
- Able to work under very heavy workload and tight deadlines;

- Ability to deal with difficult and demanding clients;
- Knowledge of the estate provisions of the Income Tax Act (Canada);
- Ability to type 30 wpm.

Typically, the above qualifications would be attained by:

Completion of High School and Postsecondary education in bookkeeping and accounting or relevant secretarial and office administration courses and three years direct experience; OR
A minimum of five years direct experience in a trust accounting environment; OR
A minimum of five years in an office with legal and financial responsibilities; which includes a minimum of two years experience in the administration of estates.

ADDITIONAL REQUIREMENTS

Position Security (check one)

☐ No criminal records check required
☐ Position of Trust – criminal records check required
☐ Highly sensitive position – requires verification of identity and a criminal records check

French language (check one if applicable)

☐ French required (must identify required level below)
Level required for this Designated Position is:
ORAL EXPRESSION AND COMPREHENSION
Basic (B) ☐ Intermediate (I) ☐ Advanced (A) ☐
READING COMPREHENSION:
Basic (B) ☐ Intermediate (I) ☐ Advanced (A) ☐
WRITING SKILLS:
Basic (B) ☐ Intermediate (I) ☐ Advanced (A) ☐
☐ French preferred

Indigenous language: Select language

☐ Required
☐ Preferred