

## Estate Manager – West

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Company: Equity Trustees Ltd

Location: Australia

Category: sales-and-related

We are looking for an Estate Manager to join our team at EQT. Reporting to the Regional Manager, you will be responsible for providing estate administration services and managing multiple deceased estate matters. You will ensure compliance with relevant legislative and regulatory requirements, and maintain effective communication with all stakeholders involved in the estate management process.

### About The Role

Managing a portfolio of distributable estates

Communicating and liaising with estate beneficiaries and both internal and external stakeholders

Ensuring the process for obtaining probate and distributing estates is carried out as per the will and as required by legislation in the relevant state

Working collaboratively with other estate administration team members, administrative support staff

Contributing to the review of standard estate letters, estate processes and procedures and being actively involved in finalising relevant documents

Monitoring account transactions' accuracy and timely processing and attending to estate administrative tasks within required time frames.

## What You'll Need To Succeed:

Strong organizational and self-motivational skills

Positive 'can-do' attitude

Excellent written and verbal communication skills with a high level of attention to detail

Ability to work effectively as part of a team

High level of resilience and emotional intelligence

Proven efficiency and process improvement skills

Exceptional computer skills

Experience in a similar role is highly regarded

Tertiary qualification in finance, law, or a related field is highly regarded

## What We Can Offer You

A warm, open and supportive culture in a vibrant and collaborative team

A attractive remuneration package, including reward and recognition programs

A employee wellness program, including discounted health insurance and an employee assistance program

A workplace volunteering and giving program to enable you to help others in the community

Discounted tax and estate planning services

Great central CBD location, modern office fit-out and end of trip facilities

## About Us - Trusted Since 1888

Equity Trustees was established in 1888 and are now one of Australia's largest specialist trustee companies. We help our clients grow, manage, and protect their wealth now and for generations. As a trustee company, it is our responsibility to always act in our client's best interests, ensuring they feel safe, valued, and cared for.

Equity Trustees acquired Australian Executor Trustees in late 2022, significantly expanding the Trustee & Wealth Services part of the business. It is a transformative acquisition consistent with the company strategy of being Australia's leading trustee, offering great opportunities for all employees across the newly integrated business.

We are committed to providing a flexible, rewarding workplace and supportive of individual development. Just as you will help us grow our business, we will help you grow in your career.

This vacancy is managed directly by the Equity Trustees' HR team. We will contact our preferred agency partners should we require additional support. Thank you.

#J-18808-Ljbffr

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