

WILLS DRAFTER AND SAFE CUSTODY ADMINISTRATOR

REPORTING RELATION

Manager, Estates Administration Team

PURPOSE OF JOB

Draft Wills for Citadel clients and prospects under instruction.

Assist with the correct execution of Wills, follow up on the execution of Wills drafted and check signed Wills to ensure they are validly executed.

Lodge original Wills and other original documents in safe custody.

Maintain safe custody records.

Maintain and update the Wills templates/precedents, under supervision of the template committee and the Manager, Estates Administration.

KEY RELATIONS

Wealth Advisors

Fiduciary Specialists and Assistants

QUALIFICATION AND EXPERIENCE

Matric / Grade 12 / National Senior Certificate is a minimum requirement and a Paralegal Diploma or Legal Secretary qualification is an added advantage.

FISA Wills drafter certificate or equivalent.

Three to 5 years' Wills drafting experience in a law firm / deceased estates/fiduciary environment.

Knowledge and technical know-how relating to all aspects of Wills drafting and safe custody process

Deceased Estates experience is preferable.

Exceptionally good language skills (Afrikaans and English).

COMPUTER COMPETENCY REQUIREMENTS

Microsoft packages, Outlook, Word and Excel in particular

The ability to learn and use systems with confidence

KPA/ STRATEGIC BUSINESS DELIVERABLES

Communication

Respond to requests for draft Wills in compliance with the timelines as contained in the Fiduciary service level agreement.

Clarify instructions where necessary.

If required, explain the Wills drafting service to and effectively communicate with Wealth advisors to manage their expectations on the service (including that there can be no direct communication with clients).

Provide a draft Will in compliance with the instructions and the timelines as contained in the Fiduciary service level agreement.



Effectively communicate (drafting, typing, scanning, sending emails, making calls, following up) in respect of all documentation and activities required to draft and execute the Will and to lodge documents in safe custody.

Build and maintain professional relationships with Wealth Advisors and Fiduciary Specialists and Assistants.

Document Management

Produce draft Wills in Citadel house style.

Make amendments to draft Wills as and when required.

Ensure proper version control of typed Wills.

Complete the Wills screen on Tyrus in respect of the draft Will.

Maintaining the correct and accurate filing and record-keeping of all Wills and other documents lodged in safe custody.

Risk management

Ensure that the drafted Will is legally binding and practically implementable.

Ensure that the signed Will is correctly executed before lodging it in safe custody and if not take appropriate steps to rectify the situation.

Follow up on the execution of Wills to ensure that only a maximum of 10% (ten per cent) of total Wills drafted per annum are unsigned.

Work proactively to ensure the Wills drafting service is rendered in compliance with legal, good governance and statutory requirements.

Utilise the Management Information Systems (MIS) capability on Tyrus to provide lists and statistics related to the Wills drafting and safe custody functions.

General

Identify and action business development opportunities and enhance cross sales.

Assist with the implementation of specific projects in the fiduciary team.

Identify and recommend opportunities to enhance processes, systems and policies and support the implementation of new processes, policies and systems.

Keep abreast of legislation and other industry changes that impact on the role by reading the relevant newsletters and websites.

Improve personal capability and stay abreast of developments in field of expertise by identifying training courses and career progression for self through input and feedback from Manager.

Ensure personal growth and enable effectiveness in performance of role and responsibilities by completing all learning activities.

Contribute to a culture conducive to the achievement of transformation goals.

Maintain knowledge and share knowledge with colleagues.

Motivate, inspire and support colleagues.

COMPETENCIES	KNOWLEDGE	PERSONAL CHARACTERISTICS
<ul style="list-style-type: none">• Bi-lingual in English and Afrikaans• Excellent relationship skills	<ul style="list-style-type: none">• Relevant legislation• Understanding of the financial services industry	<ul style="list-style-type: none">• Emotionally mature and stable• Patient• Proactive



<p>and tactfulness</p> <ul style="list-style-type: none">• Excellent writing and drafting skills, including excellent typing ability and Dictaphone typing.• Meticulous, attention to detail and good data management ability• Strategic thinking - detailed orientated without losing sight of the big picture• Excellent organisational skills and time management ability – planning and execution skills• Professional and confident communication skills, both verbal and written• Self-driven• Ability to manage workload and meet deadlines• Ability to work in a pressurised environment and set priorities• Ability to administer and execute instructions, from receipt to conclusion, with minimal professional supervision	<ul style="list-style-type: none">• Fiduciary and other local compliance requirements (Master of the High Court, FICA)	<ul style="list-style-type: none">• Assertive yet professional• Client relationship and service-orientated attitude• Dynamic, flexible and enthusiastic• Honesty, integrity, accountability and responsibility of the highest order• Highly self-motivated, focussed and proactive• Solution-driven• Pragmatic problem-solver• Detail-oriented• Respect for the confidentiality of clients' affairs• Interpersonal understanding and empathy• Capacity to work both as member of a collaborative team and independently• Intent on a career in the fiduciary industry
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THE CITADEL WAY

Alignment to our clients' interests and evoke high levels of trust in both our clients and their families. Take ownership of and accountability for carrying out all aspects of the Wills drafting and safe custody process in a professional manner.