CLASS SPECIFICATION

PROBATE ESTATE CASE MANAGER

DEFINITION

Under general direction, oversees the execution of estates of deceased persons where no qualified executor exists; coordinates probate services provided by internal staff and contract professionals (e.g., attorneys, accountants, real estate agents and others); and performs related duties as required.

EXPERIENCE AND TRAINING REQUIREMENTS

A Bachelor’s degree from an accredited college or university with major course work in Criminal Justice, Business Administration, Accounting, Finance or a related field and two years of experience in investigation of assets, estate or property management, probate of estates, legal guardianship, conservatorship or related paralegal experience; OR an equivalent combination of related training and experience.

LICENSE OR CERTIFICATE

Must possess a valid driver's license at time of appointment.

SUPERVISION EXERCISED

Exercises functional supervision over Estate Investigators and probate support staff.

EXAMPLES OF DUTIES (The following is used as a partial description and is not restrictive as to duties required.)

Coordinate and oversee the probate of estates assigned to the Public Administrator which includes: compile and safeguard assets of decedent; determine and discharge debts (including tax liabilities) against the estate; coordinate the sale and/or disposal of real and personal property; supervise the final distribution of assets; and provide an inventory and accounting of activities to the Court through the attorney of record.

Supervise Estate Investigators and probate support staff, which includes: recommend hiring; provide staff training in proper work methods and techniques; assign and review work; conduct performance evaluations; implement discipline and conflict resolution procedures when necessary.

Appear in court with the attorney of record, representing the Public Administrator in legal proceedings connected with the administration and distribution of an estate, including: to petition for appointment; to file and inventory and appraisal of estate assets and liabilities; to petition for the sale of assets, payment of creditors and final distribution of the remainder of estate.

Compile and maintain case files for each estate which include a detailed narrative history of events, all legal documents and correspondence, inventories of personal property, real property and other assets, a catalogue of creditors and liabilities, a log of expenses and a log of payments made to creditors and others with legitimate claims on the estate, so that an accurate trail of events in the estate proceeding is preserved.

Monitor probate estate proceedings to ensure compliance with statutory requirements for the protection of estate assets; keep attorney of record and Public Administrator informed and provide pertinent support materials and data as necessary to remedy and deficiencies in a timely manner.

Arrange for the disposal of real and personal property or other assets by contracting with real estate agents, auction houses, stockbrokers and other appropriate professionals to sell these assets to enable the estate to pay off its liabilities and creditors.
Assist in the preparation of the annual budget of the Public Administrator's Office by providing projections and recommendations for expenditures, staffing, equipment and supplies for the estate probate operation.

Ensure that assigned personnel perform duties and responsibilities in a safe and prudent manner which does not expose them or others to unnecessary harm or risk of on-the-job injury.

**JOB RELATED AND ESSENTIAL QUALIFICATIONS**

**Full Performance** *(These may be acquired on the job and are needed to perform the work assigned.)*

**Knowledge of:**
Departmental policies and procedures.

Terms and acronyms commonly used in the assigned function.

Operations, services, activities and legal responsibilities of the Public Administrator's Office in Washoe County.

Personal computer hardware and software currently utilized by the department.

**Ability to:**
Select, supervise and evaluate the performance of assigned staff.

Observe safe work techniques and ensure they are observed by others.

Access and operate software applications utilized by the department.

**Entry Level** *(Applicants will be screened for possession of these through written, oral, performance, or other evaluation methods.)*

**Knowledge of:**
Principles of estate management and probate administration.

Principles of general management, supervision and training.

Basic techniques involved in the management of personal finances and financial record keeping.

Investigative techniques and procedures.

Safe work techniques, practices and safety regulations.

**Ability to:**
Read, interpret, apply and explain pertinent laws, statutes, codes, regulations and standards, including administrative departmental policies and procedures.

Read and interpret legal and non-legal documents associated with probate proceedings and estate administration.

Operate a personal computer.

Communicate orally clearly and concisely.

Write comprehensive narrative reports, correspondence, memoranda and other documents.

Plan and prioritize work to meet schedules and timelines.

Maintain confidential data and information.

Maintain accurate and complete records.

Interact considerately and effectively with next of kin and others involved in the estate of the deceased.

Establish, maintain and foster effective working relationships with those contacted in the course of work.
SPECIAL REQUIREMENTS

Essential duties require the following physical skills and work environment.

Ability to work in standard office environment.

This class specification is used for classification, recruitment and examination purposes. It is not to be considered a substitute for work performance standards.

Approved _____ WERCCS Job Evaluation Committee _______ Date _____ March, 2001 _____