



# WE'RE HIRING



We're on the lookout for experts in their field who have a passion for the financial services industry and a desire to deliver worldclass customer service to eligible professionals.

If you are interested in joining our team of experts,

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PPS is a licensed life insurer, controlling company and authorised FSP.



FOR PROFESSIONALS  
SINCE 1941

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<b>Job Title</b>	<b>Estates Manager</b>
<b>Business Area</b>	Fiduciary Services
<b>Business Unit</b>	Advice and Distribution (A&D)
<b>Location</b>	Johannesburg or Pretoria
<b>Role reports to</b>	Head: Fiduciary Services
<b>Budget Accountability</b>	Yes
<b>Number of direct reports</b>	Not at this stage
<b>Overall Job Purpose</b>	
To set up the Estate administration division and processes and to administer Estates within the PPS Group. The incumbent will perform various administrative, servicing and support functions in Estate administration and act as the liaison with beneficiaries of Estates being administered. The incumbent will also be required to upskill administrator support staff.	
<b>Key Accountabilities</b>	
Set up and take accountability for a new Estates administration division within PPS, including: <ul style="list-style-type: none"> <li>o Monthly reporting to heirs</li> <li>o Decision making and problem solving</li> <li>o Customer report and satisfaction</li> <li>o Liaison between various Governmental Departments and Financial Institutions</li> <li>o Decide on whether to accept the Executorship or motivate why an Estate matter should be renounced</li> <li>o Ensure statutory, legal and compliance requirements are adhered to</li> <li>o Ensure audit policies are adhered to and reported on to Legal and Compliance</li> </ul>	
Select and implement a Estate administration software package system <ul style="list-style-type: none"> <li>o Adopt suitable diary system and report back</li> <li>o Implement system processes and adherence thereto</li> <li>o Introduce standard liaison and reporting communications</li> </ul>	
Administer new Estates which fall in within a reasonable timeframe, including: <ul style="list-style-type: none"> <li>o Onboarding of new Estate matters</li> </ul>	

Life Insurance | Investments | Financial Planning | Short-Term Insurance | Medical Aid

**PROFESSIONAL PROVIDENT SOCIETY INSURANCE COMPANY LIMITED (REG NO. 2001/017730/06)**

Directors: Mr C Erasmus (Chairman), Prof H E Wainer (Deputy Chairman), Mr C E Backeberg, Mr N J Battersby (Deputy Group CEO), Mr L M de Villiers, Mr A H de Vries, Ms D L T Dondur, Mr J A B Downie, Dr D P du Plessis, Mr E J S Franklin, Dr N H P Khosa, Dr C M Krüger, Prof W J Maroun, Mr P Ranchod, Dr S N E Seoka, Mr I J Smit (Group CEO), Mr S Trikamjee.  
Company Secretary: Mr V E Barnard.

Professional Provident Society Insurance Company Limited is a licensed insurer conducting life insurance business, a licensed controlling company and an authorised FSP.

[PPS INSG01/2024]

- o Meet with and send out pro-active communication with heirs
- o Attend to the transfer/sale of assets at market related (best possible) prices
- o Evaluate and approve/decline advances sought by heirs against the liquidity in Estates
- o SLA establishment with Vendors, including Estate Agents, appointed Agents and Conveyancing Attorneys
- o Attend to the preparation and submission of Liquidation and Distribution Accounts
- o Liaison with the Master's offices, SARS, Municipalities and Financial Institutions
- o Appoint Agents to address matters within the Master's office, SARS, Municipalities, etc
- o Obtaining COB's within negotiated timelines with Financial Institutions
- o Attend to the finalisation of Estate matters and the archiving thereof
- o Take fees as and when against completed milestones

Take accountability for training and upskilling of part-time Administrator assistance

- o Set KRA's and job description
- o Undertake bi-annual performance appraisal discussions
- o Implement development plans for part-time administrator support
- o Upskill part-time administrators
- Keep abreast with industry changes within the Fiduciary Services industry, specifically within the Estates environment and upskilling oneself.
- Financial, budget and income statement tracking and budget attainment.
- Address any complaints received, and report back on matters received through Internal Complaints Departments or the Industry Ombud
- Upholding the highest level of quality standards and dealing with demanding, professional clients
- Living the PPS culture by taking extreme ownership, being eternally curious and doing the right thing

## Key Requirements

### Education:

- Bachelor of Laws or suitable Legal degree

### Experience:

- 5 years managerial experience
- At least 10 years' experience in administering estates
- Dealing with and engaging with Distribution Channels
- Dealing with the professional and Private Client markets

### Knowledge and Skills:

- An in-depth knowledge of Fiduciary Services, including:
  - Estate administration
  - Trust administration
  - Trust and Estate planning

### Competencies:

- Strong interpersonal skills.
- Strong independence and work ethic.
- Ability to build strong relationships and to expand network of support.
- Ability to engage and obtain support from the likes of the Master's offices, SARS, Municipalities and Financial Institutions.
- Ability to provide training to Estates administrator support staff.

<ul style="list-style-type: none"> <li>• Resilience.</li> <li>• Ability to work without supervision.</li> <li>• Ability to achieve financial revenue targets whilst keeping costs in check.</li> <li>• Ability to co-ordinate and act as a liaison between client/broker or planner/product provider.</li> </ul>	
<b>Special work requirements: (e.g. On the job travelling across geographies etc)</b>	Be able to commute between Johannesburg and Pretoria
<b>Employment contract type</b>	Permanent
<b>Anticipated Start date</b>	1 July 2024
<b>Application deadline</b>	15 May 2024
<b>Contact person</b>	Christine Harrison on <a href="mailto:charrison@pps.co.za">charrison@pps.co.za</a>

Preference will be given to Employment Equity candidates.

PPS adopts a hybrid approach in respect of work. This entails that you will be required to work at a specific office location on some days and remotely on others (a minimum of three days in-office per week – Mondays, Tuesdays and Thursdays).

*You acknowledge that any information supplied to PPS is provided voluntarily and therefore constitutes unconditional, specific, and voluntary consent to the processing of such information by PPS. Your personal information will be processed for facilitating your application for employment with PPS as well as any statutory or regulatory compliance with which PPS must comply (where applicable) and for the legitimate interests of PPS and yourself, both during the recruitment process and thereafter. You may instruct PPS by written notice to cease the processing of your personal information at any time and, subject to the requirements of applicable South African law, request that PPS delete and/or de-identify such personal information.*

To apply, please access the Careers page of our company website on <https://www.pps.co.za> or by using the following link to our job portal: <https://pps.erecruit.co/>