
ROLE:	Trust Specialist
REPORTS TO:	South/West Team Manager
TENURE:	Permanent
LOCATION:	South/West (Whanganui)

About Te Tumu Paeroa

E totoka ai te tumu o te papatipu hei oranga mō Te Iwi Maori, o mua, o naianei, o anamata hoki. Ko Te Tumu Paeroa tēnei, te kaitiaki, kaitaunaki, kaiwhakawhanake i te mana o ngā whenua Māori, huri noa.

So that the foundations of ancestral lands may be solid, benefitting Māori from our past, present and future alike.

This is Te Tumu Paeroa, guardian, support and advancer of the mana of Māori land everywhere.

Role Purpose

The Trust Specialist is primarily responsible for:

- Building and establishing relationships with owners, trustees and external organisations.
- Managing a portfolio of Trusts, ensuring a comprehensive understanding of the affairs of each Trust and ensuring high standards of service delivery.
- Ensuring Māori Land Court applications, hearings and processes are completed efficiently.
- Facilitating meetings of owners and advisory trustees and managing agreed actions through to completion.
- Working with the team and Team Managers to ensure service delivery is consistent and to a high standard.
- This role requires some travel and some weekend work.

Key Accountabilities

Māori Land Court

- Ensure the preparation of the Māori Trustee report and Māori Land Court applications in support of a review and/or variation of the terms of the Trust Order and any other Trust matters requiring the Court's direction.
- Prepare and submit relevant applications for the Court to enable the appointments of Te Tumu Paeroa to be approved and represent Te Tumu Paeroa in Court in respect of those cases.
- Ensure all post Court activities are logged in the appropriate systems in accordance with the policies, procedures, and processes at Te Tumu Paeroa.
- Build solid relationships with key personnel within the Courts.
- From time to time, attend the Māori Land Court representing the Māori Trustee.

Meetings of Owners

- Build and preserve trusting relationships with advisory trustees, owners and other key stakeholders.
- Facilitate meetings of owners and advisory trustees as required.
- Ensure meetings of owners and trustees are scheduled in accordance with the respective Trust Orders, formal owner/trustee requests and Te Tumu Paeroa business processes.
- Ensure the required meeting material is of a professional standard, provides the required information and is prepared in a timely fashion.
- Ensure all post meeting activities are logged in the appropriate systems in accordance with the policies and processes at Te Tumu Paeroa.
- Review meeting minutes and ensure approval within 72 hours of the meeting.
- Actively manage agreed meeting actions and issues arising, ensuring these are completed in a timely manner.

Trust Management

- Ensure the maintenance of Trust records and owner information.
- Develop and maintain a comprehensive understanding of the affairs of each Trust.
- Liaise with external stakeholders to ensure all relevant trust records are supplied, including the transfer of any financial assets.
- Review and maintain financial records of each Trust in accordance with the policies and procedures at Te Tumu Paeroa.
- Assess, recommend and/or approve the amount of distributions payable in accordance with agreed policy and update the relevant systems.
- Provide detailed recommendations to the Trust & Property Director as to whether Te Tumu Paeroa should accept Responsible Trustee or Agent appointments.
- Liaise with relevant parties to obtain historical information about the whenua to enable due-diligence processes to be undertaken if required.
- Where applicable, arrange for the completion of any Service Level Agreements to be executed.
- Actively manage trust initiatives, issues and complex enquiries as required.
- Provide the details of services available, fees associated and the roles and responsibilities of the respective parties.

Collaboration

- Work proactively and collaboratively with all teams across Trust & Property to ensure consistent practices and outputs across New Zealand.
- Contribute to the annual planning activities of Te Tumu Paeroa.
- Liaise with other Trust Specialists and the wider Trust & Property Team to ensure compliance and relationship activities are managed seamlessly.
- Liaise with internal stakeholders to establish records in Te Tumu Paeroa administration systems and manage all associated activities through to implementation.
- Ensure stakeholder expectations are managed through effective and timely communication.
- Provide support and training to the wider Trust & Property team on core trust management processes and complexities.
- Contribute to work that is being led by others across the Trust & Property Team by providing accurate information and advice within specified timeframes.

- Provide guidance and quality assurance across the Trust processes of Te Tumu Paeroa to ensure that work produced is accurate, consistent and of a high quality.
- Mentor and assist in the development of Trust Coordinators.
- Support the development of new team members, ensuring a high level of capability.

Organisational obligations

- Comply with all the policies and procedures at Te Tumu Paeroa.
- Follow and promote all Health and Safety practices and instructions.

Professional and Career Development

- In conjunction with your Manager, identify areas for both personal and professional development in line with your Individual Development Plan.

Core Competencies

Ngā Pae Mōhiotanga Reo Māori

- Pae Tahī- Te Whakahua: A desire and ability to practise correct pronunciation of Te Reo Māori. (Essential)
- Pae Rua- Te Whakarongo: An ability to understand Te Reo Māori, a desire and ability to practice correct pronunciation of Te Reo Māori. (Essential)
- Pae Toru- Te Mau me Te Whakahoki: An understanding of Te Reo Maori and the ability to answer and converse in the language. A desire and ability to practise correct pronunciation of Te Reo Māori. (Essential)

Ngā Pae Mōhiotanga Tikanga Māori

- Pae Tahī- Nō Ia Rā: An understanding and living of Tikanga Māori on a day-to-day level, for example, the removing of shoes before entering a whare, washing hands at the urupa and not sitting on tables. (Essential)
- Pae Rua- Te Noho Marae: An understanding and living of Tikanga Māori on a noho marae level. Knowing and practising things such as basic karakia, waiata and one's own pepehā. (Essential)
- Pae Toru- Te Ao Wairua: An understanding and living of Tikanga Māori on an Ao Wairua level. Knowing and practising things such as karanga, whaikōrero, whakapapa, karakia tahito and mōteatea. (Essential)

Customer Focus

- Listens to the views of our customers and make decisions in the interests of all owners as a responsible Trustee.
- Models and encourages excellent customer service and considers customers in all business development planning.
- Seeks inputs from customers to ascertain their needs.
- Sets clear expectations with customers and stakeholders and manages or exceeds those expectations.
- Addresses and resolves promptly any customer queries or concerns.

Relationship Management

- Develops relationships within and outside the organisation by working with and through people to achieve outcomes.

Teamwork / Interpersonal Skills

- Builds and maintains relationships through respect for individuals, open communication and displaying sensitivity towards others.
- Demonstrates an approach to working with and through others that shows a willingness and drive to embrace a culture of collaboration and ownership.
- Works comfortably at all levels (internal and external).

Quality and Results Focus

- Is detail conscious and continually strives for greater levels of effectiveness, efficiency and minimisation of risk.
- Sets goals, predicts and overcomes barriers to achievement.
- Maintains a focus on priorities.
- Demonstrates initiative (i.e. takes action before being asked, makes suggestions on how to improve things, attempts to resolve problems in the first instance).
- Demonstrates energy, determination, tenacity and persistence to achieve outcomes.
- Shows a commitment to continuous learning and development - thus improving capabilities for the organisation.

Higher-level Thinking and Judgement

- Sees the bigger picture / patterns and connections.
- Is perceptive and insightful – comfortable in a new environment and understands it very quickly.
- Anticipates and identifies consequences of actions and obstacles - makes sound decisions based on thorough analysis.

Integrity and Accountability

- Maintains a high standard of ethical practice, remaining fair, honest, reliable and trustworthy in dealings with all people.
- Demonstrates loyalty to the vision and values of the Māori Trustee through own business practices.
- Portrays a professional image to customers (internal and external) and actively supports the Māori Trustee's initiatives.
- Takes responsibility for own actions.