

Estate Property Specialist

Definition

Under supervision, to locate, secure, inventory, monitor, and maintain the personal property of persons or estates placed under the jurisdiction of the Public Administrator/Public Guardian's Office.

Distinguishing Characteristics

Estate Property Specialists differ from all other material handling classifications in the County, in that the former handles estate property such as: clothing, furniture, jewelry, furs, cars, animals, boats, firearms and miscellaneous property instead of supplies and equipment. Further, the Estate Property Specialist classification differs from other material handling classifications in that the duties assigned to the Estate Property Specialist are of a more sensitive and difficult nature due to privacy and confidentiality issues involving dealing with the public, clients, relatives and businesses. The Estate Property Specialist works independently in the field making decisions on the disposition of the property based upon general guidelines of the office as well as statutes and practice in the area of conservatorships and decedent estates.

Estate Property Specialists must follow detailed handling procedures of access and entry to client-owned property, and their disposition. Estate Property Specialists may encounter situations where firearms, toxic chemicals, explosives and narcotics are located.

Typical Tasks

- Searches and secures all client-owned property against damage, theft, loss by identifying, documenting, evaluating, and removing items or notifying authorities;
- Packs, moves and/or transports items to secure storage, delivery for sale or consignment of disposal of items of no value, which includes driving or arranging for towing of vehicles for sale or storage;
- Estimates value of general household items and vehicles, and may arrange for professional appraisal of property of high or questionable value;
- Performs various clerical duties in connection with the storage, sales and record keeping of conservatorship and decedent estates;
- Creates and maintains inventory control records in the Property Section;
- Evaluates condition of personal property items to determine value and selects best method to sell the property;

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- Identifies and gathers estate/personal property valuables such as: currency, jewelry, collectibles, fine art and other valuables to be evaluated and appraised by professional appraisers;
- Prepares documents for sale of estate items including vehicles and consigns such items to appropriate contractors for sale; reviews and completes appropriate title documentation for sale of vehicle;
- Maintains County storage areas where estate property is stored;
- Operates and uses various equipment such as pallet jack, hand truck, forklift and various hand tools;
- Operates vehicles such as a box truck and cargo van;
- Transports, stores and consigns Public Administrator/Guardian estate vehicles for sale;
- Sorts, packages and transports estate property which can include: fragile items, bulky and heavy furniture, soiled and broken household items, unsanitary debris, and large volumes of trash in hazardous conditions;
- Lifts and carries heavy objects and bulky items;
- Makes arrangements for the transport of weapons and narcotics;
- Arranges for disposal of hazardous materials and monitors the work of general contractors, hauling companies, and other vendors as assigned;
- Packages and removes items where contractors are inappropriate, and may arrange for shipment in various forms, such as: overseas mail, common carriers or through dealers;
- Coordinates the sale of property at auction;
- Packs, labels, secures to prevent theft, transports property for auction and displays property at the auction site;
- Makes minor adjustments, cleans or repairs client property as needed;
- Routinely checks on client or estate property;

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- Communicates with businesses, clients, family members, law enforcement agencies and the general public;
- Acts as a member of the inventory team, which lists individually all items contained in estates and assigns approximate values as directed;
- Schedules and meets with clients and/or their relatives or friends in order to pick up, deliver, or sort personal property for storage or sale;
- May be assigned as a Disaster Service Worker, as required;
- Performs other related duties as required.

Employment Standards

Sufficient education, training, and experience to demonstrate the possession and direct application of the following knowledge and abilities:

Training and Experience Note: The required knowledge and abilities are attained through graduation from high school or equivalent and two (2) years of general maintenance, waste disposal, warehouse, or moving/storage industry work experience, six (6) months of which must have included record keeping, and inventory duties requiring use of computer skills.

Experience working with others and the general public is highly desirable.

Special Requirements

- Possession of a valid California driver's license upon appointment and the ability to qualify for and maintain a County Driver's Permit.
- The ability to obtain a permit to operate a forklift is required before completion of probationary period.
- Some positions may require Live Scan as part of the background check process.

Knowledge of:

- Inventory and record keeping, reference sources and preparation of correspondence and reports;
- Customer services principles, including dealing with irate and distressed people;

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- Computer applications, such as word processing, spreadsheets and/or database;
- Basic mathematics to perform simple calculations;
- English vocabulary, grammar, spelling, punctuation and style/format;
- Methods used in the storage, transport, and delivery of a wide variety of items;
- Safety practices, precautions in lifting and storing heavy objects and use of protective equipment.

Ability to:

- Identify, and write clear, concise descriptions of personal property items;
- Follow instructions accurately;
- Establish and maintain effective working relationships with staff, other personnel, the public and contractors;
- Advise the public of client's rights when needed to protect against loss of property;
- Safely handle and practice precautions when moving firearms;
- Create and maintain inventory records;
- Evaluate property and situations in a manner consistent with the departmental procedures, with sensitivity to the personal nature of estate property;
- Identify and sort financial and legal documents belonging to the estate;
- Perform duties under pressure from irate or confused clients, landlords, members of the public and others;
- Communicate clearly and effectively both orally and in writing;
- Maintain the integrity of complex, detailed inventory systems and document actions taken following Santa Clara County Probate Court practices.

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Physical Requirements

- Maintain, move, pack, sort heavy bulky and unbalanced boxes and loads of household items for a sustain period of time; collect and dispose of large volume of debris from client residences;
- Exercise physical exertion in the movement of heavy or bulky items weighing 50 pounds or more;
- Work in an undesirable environment where there may be rodents/pests, noxious odors, and other unsanitary or substandard conditions.

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