

## ESTATE INVESTIGATOR

DISTINGUISHING FEATURES OF THE CLASS: Under the general supervision of the Public Administrator, an incumbent of this class conducts field investigations on a fairly independent basis to identify and collect the assets of deceased persons who have died intestate. Incumbents may also investigate cases assigned to the Public Administrator by the Surrogate's Court. Responsibilities involve covering cases for Westchester County and tracing assets to whatever location they may be found. Does related work as required.

### EXAMPLES OF WORK: (Illustrative Only)

Searches living quarters of deceased persons to collect assets and paper, such as stocks, bonds, bank books, insurance policies, deeds, mortgages, etc.;

Recovers personal property such as money, jewelry, and keys from Police and Undertakers;

Takes inventory of all real property and items of value of each estate for which the Office of the Public Administrator is liable;

Searches for heirs of the deceased by checking records and papers, and questioning neighbors and friends;

Arranges for appraisals of property of estates of deceased persons, under authority as received under Letters of Administration;

Maintains accurate records for each estate;

Arranges for the disposal of un-salable materials; hiring temporary labor and cartage service as needed;

Makes detailed reports of all assets for each estate over which he assumes case responsibility;

Prepares claims against estates for expense incurred in investigations and settlements;

Assists in the general work of the office, such as collecting rents from real estate, receipts from businesses, etc. from estates which are pending settlement;

Uses computer applications and other automated systems such as word processing, spreadsheets, calendar, email and database software in performing work assignments;

May perform incidental tasks, as needed.

FULL PERFORMANCE SKILLS, ABILITIES, AND ATTRIBUTES: Good knowledge of the Decedent Estate Law; good knowledge of the policies and practices of the Office of the Public Administrator and its relationship to the Surrogate's Court; familiarity with the methods and techniques of investigation; ability to use automated systems such as word processing, spreadsheets, calendar, email and database software; ability to read, write, speak and understand English sufficiently to perform the essential functions of the position; resourcefulness; good judgment; tact; physical condition commensurate with the demands of the position.

MINIMUM ACCEPTABLE TRAINING AND EXPERIENCE: A Bachelor's Degree\* and either (a) three years of experience performing account keeping or investigative functions involving trusts, estate and guardianships; or (b) three years of experience in law enforcement, criminal justice or in the performance of investigations.

NOTE: Education beyond the secondary level must be from an institution recognized or accredited by the Board of Regents of the New York State Department of Education as a post-secondary, degree-granting institution.

SPECIAL REQUIREMENT: Possession of a New York State Driver's License