

# Job Opportunity:

## Money Adviser (Trainee positions available)

citizens  
advice

Derbyshire  
Districts

**Hours: Part-Time** (29.6 hours per week)

**Contract: Permanent**

**Salary: £27,263 to £29,806 per annum, pro rata** (depending on experience)

**Location: Matlock** (hybrid mix of home and office working with travel to outreach locations)

### About the role:

Providing both **face to face and telephone advice**, you will help people to overcome their debts and learn how to manage their budgets. With a desire to help coupled with an ability to manage a caseload and monitor deadlines, you could really make a difference to people's lives.

As a Money Adviser, you will deliver **high-quality, FCA-regulated money advice** to individuals in financial difficulty. You will join our friendly team, committed to helping people take control of their finances and build a more secure future through tailored **advice and casework**.

We welcome applications from experienced advisers, as well as those looking to train in this vital area of work. **Full training and support will be provided** for the right trainee candidates, including completion of the accredited *Money Advice Learning Plan*.

We welcome and encourage applications from people of all backgrounds. We are proud to be a **Disability Confident Employer** and hold the **Derbyshire LGBT+ Rainbow Accreditation**.

### Who we are looking for:

The ideal candidates will have:

- Excellent **communication skills** – both written and verbal (essential)
- A **non-judgemental, empathetic approach** to people (essential)
- Strong **IT and digital skills**, with the ability to learn new systems quickly (essential)
- A commitment to working to **performance targets** and **KPIs** (essential)
- Experience in providing **FCA-regulated money advice** (preferred)
- A solid understanding of the **current welfare benefits system** (preferred)

### What we offer:

We're proud to offer a comprehensive benefits package that supports your wellbeing, work-life balance, and professional growth:

- **Generous annual leave:** 35 days per year (pro rata), including all bank holidays and Christmas
- **Buy/sell leave scheme:** Flexibility to buy or sell up to one week of leave each year (pro rata)
- **Employee Assistance Programme:** Includes wellbeing support, free counselling, and lifestyle perks
- **Contractual sick pay:** depended on length of service
- **Long service rewards:** Extra leave and gift cards after five years of service and beyond
- **Workplace pension:** Auto-enrolment into our pension scheme
- **Hybrid working:** the option to work from home, if it works for you and for us

Successful candidates will be required to undertake a Disclosure and Barring Service (DBS) check.

**To view and download the recruitment pack and to apply for the role visit:**  
[www.citizensadviceDerbyshireDistricts.org.uk/staff/](http://www.citizensadviceDerbyshireDistricts.org.uk/staff/)

**Closing date:** When suitable candidates are found

**Interviews:** TBC

# Job Description

## Money Adviser

**Team:** Money Advice

**Reports to:** Advice Service Manager

**Role Purpose:** To provide a comprehensive money advice service to clients and act as a specialist resource for other Citizens Advice staff. The postholder will deliver advice and casework across a range of money advice issues, support income maximisation, and contribute to the development and quality of the service.

### Main responsibilities

#### Advice and Casework:

- Provide high-quality advice and casework across the full range of money advice issues.
- Act on behalf of clients by negotiating with creditors, drafting correspondence, and making telephone calls.
- Liaise with third parties such as creditors, landlords, and statutory bodies as appropriate.
- Maximise clients' income by identifying and supporting claims for relevant benefits.
- Prepare and present cases to appropriate statutory bodies, tribunals, and courts, where required.
- Address related client issues when integral to the money advice case, referring on to other advisers or specialist agencies when appropriate.
- Offer a multi-channel approach including face to face, telephone, email, webchat and where necessary outreach or home visits.
- Offer expert advice and support to other staff across the full spectrum of money advice topics.
- Ensure all advice and casework adheres to Citizens Advice quality standards, the organisation's policies, MaPS standards and any other relevant quality standards.
- Maintain accurate and up-to-date case records for continuity, information retrieval, monitoring, and reporting purposes.
- Follow all internal systems and procedures in line with the organisations policies.
- Ensure any project KPIs are met, including client volumes and quality of advice.

#### Social Policy:

- Support social policy work by identifying issues arising from client cases.
- Provide statistical and narrative information on the number and nature of cases to management.
- Contribute to the creation of detailed case studies for impact monitoring.
- Alert colleagues to relevant local and national issues affecting clients.

## **Professional Development:**

- Stay up to date with changes in legislation, case law, policies, and procedures relating to money advice, and undertake relevant training.
- Engage in self-directed learning, including reading relevant publications.
- Attend internal and external meetings as agreed with the line manager.
- Participate in supervision, team meetings and management meetings, as appropriate.
- Contribute to service development initiatives.
- Achieve a minimum of 16 Continuing Professional Development (CPD) points per year.

## **Administration:**

- Review and suggest improvements to service delivery and operational procedures.
- Use IT systems for case recording, statistical reporting, and document production.
- Maintain an up-to-date understanding of internal policies and procedures.
- Develop and maintain effective working relationships with relevant external agencies.
- Represent the service at meetings with statutory and non-statutory partners as required.

## **Teamwork and Relationships:**

- Maintain positive and professional working relationships with all colleagues.
- Participate in team meetings, training sessions, and service reviews as required.
- Attend away days, development days and events

## **Other duties and responsibilities:**

- Carry out other tasks that may be reasonably required to ensure the effective delivery and development of the service.
- Uphold the aims and principles of the Citizens Advice service, including its commitment to equity, diversity and inclusion.
- Support staff wellbeing and help to maintain a balanced and healthy working environment.
- Comply with all health and safety guidelines and take shared responsibility for personal and team safety.
- Identify and address personal learning needs in line with professional development goals.
- Work within all organisational policies and procedures.

*Please note: This job description is not exhaustive or exclusive. It is intended as an outline of the key areas of activity and may be amended in line with the evolving needs of the organisation*

# Person Specification

## Money Adviser

**Team:** Money Advice

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### Essential:

- Demonstrable knowledge and experience of money advice and welfare benefits.
- Strong oral communication skills, particularly in negotiating and representing clients.
- Effective written communication skills for correspondence, case reviews, and reporting.
- Effective IT skills for case recording and management.
- A methodical approach to casework, with the ability to follow and improve procedures.
- Understanding of the issues involved in interviewing and advising clients.
- Numeracy sufficient to carry out calculations involved in benefits and debt advice.
- Ability to prioritise tasks, meet deadlines, and manage a busy caseload.
- Competence in using IT for case recording, research, and report writing.
- Ability to give and receive feedback constructively and sensitively.
- Willingness to work as part of a team and support colleagues.
- Ability to monitor, maintain and reflect on personal standards of performance.
- Awareness of social trends and how they impact clients and service provision.
- Commitment to the aims and values of the Citizens Advice service, including a strong understanding of and commitment to equity, diversity and inclusion.

*Please note: This person specification is not exhaustive or exclusive. It is intended as an outline of the key areas of activity and may be amended in line with the evolving needs of the organisation*