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| Job Title | Financial Inclusion Advisor  | Reports To | Duty Manager |
| Location: | Money Matters  | Travel | Travel may be required |
| Level/Salary Range: | £22,000 - £27,000 per annum FTE | Position Type: | Full time Position |
| HR Contact: | Duty Manager/Operations Coordinator | Closing Date | 28 September 2021 |
| Applications Accepted By: |

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| email: recruitment@moneymattersweb.co.uk | Due to remote working we are not accepting applications by mail |

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| ORGANISATIONAL CONTEXT |
| Here at Money Matters, we are building an integrated, inclusive and best-in-class organisation. Our aim is to deliver a holistic financial inclusion service to our clients.The Advisor function is a key component in the effort to establish best in practice advice giving, working in close partnership with Operations, Admin, Support and Management Team.The main focus of the Advisor is to deliver a financial inclusion/capability/energy service working at a level expected by the Scottish National standards to all service users.The role will be to advocate on behalf of Money Matters clients to creditors, benefit authorities etc. and to provide an understanding of processes, court hearings, tribunals etc., and to support/represent through these processes if necessary.**JOB SPECIFICATION****Role and Responsibilities**1. To conduct interviews with clients by telephone, email or face to face in the Money Matters office or outreaches as required.
2. To provide a benefit check to ensure Benefit Maximisation as well as financial capability work
3. To provide guidance, information, representation and support in the areas of welfare benefits and money advice at up to Type 3 of Scottish National Standards.

3. To communicate effectively with third parties on behalf of the client.1. To manage a case load and carry out detailed financial inclusion casework on the client’s behalf.
2. To sign post clients to other relevant specialist sources where appropriate.
3. To maintain accurate computer records in line with money matters procedures, and to ensure all client mandates are in place in line with GDPR.
4. To keep abreast of current legislation relevant to the Financial Inclusion sector and take responsibility for own personal development.
5. To ensure all benefit advice is delivered in line with quality standards/SNS.
6. To participate in any training or activities to improve advice practices and business processes.
7. To adhere to the policies and procedures of Money Matters.
8. Perform other related duties as required.
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**PERSON SPECIFICATION**

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|  **POST OF: Financial Inclusion Advisor** |  |
| **ATTRIBUTES** | **ESSENTIAL** | **DESIRABLE** | **METHOD OF****ASSESSMENT** |
| **RELEVANT WORK/ OTHER EXPERIENCE**Expert current knowledge of welfare benefits both from DWP and SSSExperience of providing advice to clients face to faceExperience of providing advice to clients via telephone and emailExperience of identifying crisis/emergencies for clientsExperience of offering holistic adviceExperience of managing a caseloadExperience of effective signposting |  |  | Curriculum Vitae/interview & Assessment |
| **SKILLS AND ABILITIES**Excellent literacy and numeracy skillsHigh level of Computer literacyExperience of using Advice ProAbility to write clear and comprehensive case notesAbility to manage caseload (review cases, update cases, identify and work to time scales)Ability to perform manual benefit calculation |  |  | Curriculum Vitae/interview & Assessment |
| **PERSONAL QUALITIES**Ability to work aloneAbility to work with colleaguesExcellent communication skillsAbility to work under pressureAbility to prioritise work and manage crisis and emergencies effectivelyAbility to keep knowledge and skills up to date and be motivated to do so  | **√** |  | Curriculum Vitae/Interview |

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| **ADDITIONAL JOB REQUIREMENTS**Driving licenseFlexibility/some evening work may be required. |  |  |  |

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