**Money Matters Money Advice Centre**

**Job Description & Person Specification**

**Job Title:** Financial Inclusion Adviser  
**Reports to:** Duty Manager  
**Location:** South Lanarkshire and/or Glasgow  
**Travel:** May be required  
**Salary:** £30,900 (dependent on skills and experience)  
**Position Type:** Full-time (32 hours over 4 days)  
*Part-time applicants will also be considered*  
**HR Contact:** Geraldine Cotter  
**Closing Date:** 22 July 2025

Organisational Overview

At Money Matters Money Advice Centre, we are dedicated to delivering inclusive, client-centred support to individuals and families experiencing financial hardship. Our integrated financial inclusion service spans welfare benefits, debt, energy efficiency, and financial capability.

As a Financial Inclusion Adviser, you’ll play a vital role in delivering high-quality advice in line with the Scottish National Standards for Information and Advice Providers (SNSIAP). You will support clients across a variety of projects, contributing to meaningful and measurable outcomes.

**Key Responsibilities**

* Conduct assessments with clients (in person, by phone, or email) to understand their financial circumstances.
* Carry out benefit checks and deliver advice on energy efficiency, financial capability, and income maximisation.
* Provide advice, representation, and casework in welfare rights and debt, up to Type 3 SNSIAP, where required.
* Liaise with creditors, DWP, SSS, and other third parties on behalf of clients.
* Manage a caseload efficiently, maintaining up-to-date and accurate records using AdvicePro.
* Signpost clients to other support services and organisations when appropriate.
* Offer budgeting and financial planning advice.
* Ensure all client records and documentation comply with GDPR and organisational policies.
* Stay informed of legislative updates relevant to financial inclusion.
* Participate in internal training, service reviews, and quality assurance procedures.
* Perform other tasks in line with the role’s purpose and service needs.

**Person Specification**

**Work Experience**

| **Attribute** | **Essential** | **Desirable** | **Required for Some Roles** |
| --- | --- | --- | --- |
| In-depth knowledge of welfare benefits (DWP & SSS) | ✅ |  |  |
| Experience giving face-to-face advice | ✅ |  |  |
| Experience advising via telephone and email | ✅ |  |  |
| Experience recognising and managing client crises | ✅ |  |  |
| Holistic, person-centred advice experience | ✅ |  |  |
| Caseload management experience | ✅ |  |  |
| Experience with signposting and referrals | ✅ |  |  |
| Tribunal representation |  |  | ✅ |
|  |  |  |  |

**Skills and Abilities**

| **Attribute** | **Essential** | **Desirable** | **Required for Some Roles** |
| --- | --- | --- | --- |
| Excellent written and numerical skills | ✅ |  |  |
| Clear and accurate case recording | ✅ |  |  |
| Familiarity with AdvicePro |  | ✅ |  |
| Strong case study/report writing | ✅ |  |  |
| Effective time and workload management | ✅ |  |  |
| Manual benefit calculation |  | ✅ |  |
| Strong IT and digital competency | ✅ |  |  |

**Personal Qualities**

| **Attribute** | **Essential** | **Desirable** | **Required for Some Roles** |
| --- | --- | --- | --- |
| Excellent communication and interpersonal skills | ✅ |  |  |
| Ability to work independently and as part of a team | ✅ |  |  |
| Flexible and responsive to change | ✅ |  |  |
| Resilient under pressure | ✅ |  |  |
| Commitment to learning and development | ✅ |  |  |
| Empathy and adaptability with vulnerable clients | ✅ |  |  |

**Additional Requirements**

| **Attribute** | **Essential** | **Desirable** | **Required for Some Roles** |
| --- | --- | --- | --- |
| Driving licence and access to a car | ✅ |  |  |
| PVG membership | ✅ |  |  |
| Willingness to work occasional evenings |  | ✅ | ✅ |

**What We Offer**

* A welcoming, supportive, and inclusive team culture
* A meaningful role with visible impact on people’s lives
* Ongoing professional development and training opportunities
* A competitive benefits package, including:
  + 32-hour workweek over 4 days
  + £30,900 salary (DOE)
  + 8 weeks' annual leave (rising to 9 with service)
  + 6% employer pension (after probation)
  + Life insurance (2x salary, non-contributory)
  + Discretionary December bonus (subject to company performance)
  + Team social and charity events

**Apply by sending your CV and covering letter to:**  
**recruitment@moneymattersweb.co.uk**  
C**losing date: 22 July 2025**  
*Early applications are encouraged—interviews may be conducted prior to closing.*

**Money Matters Money Advice Centre is an equal opportunities employer.**  
We celebrate diversity and are committed to creating an inclusive environment for all employees.