



Job Description:	Trainee Money Adviser
Hours:	37 hours
Salary:	Starting salary £21,386 pa
Employer's Pension Contribution:	3%
Responsible to:	Senior Money Adviser
Based at:	South Somerset Citizens Advice Offices and Outreach

Overview

We are a busy advice service with a team of paid and volunteer advisers.

This post will join us and the nationally recognised training scheme for money advisers. Upon completion the successful candidate will be certified as a money advice professional.

As a trainee money adviser you will need to have both excellent people skills and be a very confident and committed learner. The successful candidate will be able to demonstrate that they are capable of completing a structured learning programme and passing competency assessments for each study module. Alongside the formal learning programme the trainee money adviser will have support from an experienced debt caseworker and mentor. Following the initial study programme the trainee will move into a phase of supervised client work extending for a further 6 months with full certification expected within one year of commencement.

Key Tasks

Assessing and Advising Clients

1. To interview and advise clients (complete their initial assessment, identify client's advice goal, undertake full exploration of their advice needs, deliver client's advice and complete accurate client case notes)
2. To undertake research to identify and provide clients with relevant advice in accordance with their advice need assessment and record advice references used in the client's case record
3. Identify key information and urgent issues and dates (e.g. priority and non-priority debts) and record these in the clients' case records
4. Work with the client to complete the debt assessment tool and draw up an agreed Standard Financial Statement
5. Enable clients to identify and explore various debt options they may have and explain the consequences and limitations of each option

6. Assist the clients to achieve their debt resolution outcomes
7. Complete clients' registrations, consent forms and other forms and scan and store these on client records.
8. Write up the advice session using Advice Information Codes and other procedures in accordance with the Citizens Advice quality standards.

Assisting Casework and Administration

1. To provide casework administrative support to the senior caseworkers including:
 - Producing formal communications (letters, emails and notifications)
 - Maintaining database records, appointment schedules and diaries
 - Scanning documents and attaching them to clients' records
 - Assisting with postal communications
 - Checking information and ensuring that records are accurate
 - Assist with inputting information to MART
 - Completing money advice fact finds and Debt Assessment Tools
2. Under the guidance of the Senior Caseworker to undertake casework for clients ensuring that the work completed complies fully with our quality and regulatory standards

Research & Campaigns and Monitoring

1. Identify and pass to supervisor any research and campaigns issues, of both local and national importance.

Training and Professional Development

The post holder will be required to complete their caseworker training programme in accordance with the agreed timetable and to the standards required for Money Advisers.

Participate fully in adviser refresher training and caseworker training and any other on-going professional development training and ensure that key dates for completing your training tasks are met.

Other Duties

1. To attend and participate in team and other meetings
2. Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
3. A commitment at all times to the aims, principles and policies of the Citizens Advice Service and the implementation of our equality policies.
4. Ensure the highest standard of consideration and respect to all stakeholders of the Citizens Advice Service, including clients, volunteers, colleagues and funders.
5. Liaise with other agencies as appropriate
6. Support other Citizens Advice work as requested
7. Carry out any other tasks which may be within the scope of the post to ensure the effective delivery and development of the service

Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the job and is not included to be an inflexible list of tasks.

Shortlisting and interview selection will be conducted using information provided in the application and during the interview. The Selection Matrix Criteria indicate which of both options apply to each aspect of the Person Specification

Person Specification		Selection Matrix
1	Confident learner with demonstrable experience of successfully completing work-based learning programmes or further education studies	Essential Application form and Interview
2	Willingness to train as a caseworker. Capability to achieve the caseworker training programme including debt accredited qualification within 12 months of appointment.	Essential Application form and Interview
3	Excellent communication skills with the ability to listen, to make accurate written records and notes and the ability to explain complex information clearly to clients, creditors and other stakeholders	Essential Application form and Interview
4	Demonstrable interpersonal skills able to work effectively with clients, colleagues and other stakeholders in a professional and respectful way	Essential Application form and Interview
5	High standards of numeracy, literacy and IT, including a level 2 qualification (or equivalent) in English and Maths and excellent administrative skills being able to work accurately and efficiently within a busy environment	Essential Application form
6	Ability to work effectively as part of a team and the ability to use your initiative in order to prioritise your work and the work of others, meet deadlines and ensure clients' needs are prioritised and met whilst also supporting caseworkers to work effectively in a busy environment	Essential Application form and Interview
7	Ability to work methodically and meticulously with a high level of attention to detail and accuracy	Essential Application form
8	Ability to use computer systems and office software (word and excel and the client database) very competently in the provision of advice, administrative services, record keeping (client information etc) and in the preparation of statistical and activity reports and other documents	Essential Application form and Interview
9	A commitment to continuing professional development, primarily aimed at keeping abreast of developments that are relevant to the role	Essential Application form
10	An understanding of, and commitment to, the aims, principles and policies of the CAB Service and the positive value of equality, inclusion and diversity	Essential Application form
	Willingness and ability to travel to meet the needs of the job	Essential Application form