

## Richmond AID Person Specification and Job Description

<b>Name of Role</b>	Money Advisor
<b>Responsible to</b>	Advice Manager
<b>Post Description</b>	Empower clients by providing one to one money advice covering the full range of debt advice, help with budgeting and carry out money advice casework and provide support to disabled people with complex issues and often with multiple crises.

<b>Experience &amp; Knowledge</b>	<b>Skills &amp; Abilities</b>
<p><u>Essential</u></p> <ul style="list-style-type: none"> <li>• Experience of advice giving and managing a caseload with targets</li> <li>• Experience of setting, recording and evidencing outcomes</li> <li>• Experience in the field of Debt Advice</li> <li>• Awareness of good customer service and dealing with complaints</li> <li>• Be trained in Money Advice to the required standard for the Advice Quality Standard or or willingness to undertake the training required</li> <li>• Experience of developing and maintaining effective working relations with partners</li> <li>• Excellent administration skills and working knowledge of MS Word, Outlook, database entry and other applications</li> <li>• Understanding of confidentiality, data protection issues and safeguarding issues</li> <li>• Understanding of the social model of disability</li> </ul> <p><u>Desirable</u></p> <ul style="list-style-type: none"> <li>• Experience of Welfare Benefits</li> <li>• Experience of working with disabled people or vulnerable client groups</li> <li>• Experience of supporting volunteers</li> <li>• Knowledge of legislation and recent policy changes that impact on disabled people</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to identify and resolve problems</li> <li>• Empathic approach</li> <li>• Able to work independently as well as part of a team</li> <li>• Report writing skills</li> <li>• Action orientated and can-do approach</li> <li>• Good time management and task prioritisation</li> <li>• Excellent organisational skills</li> <li>• Excellent communication skills both written and oral</li> <li>• Task orientated and can-do approach</li> </ul>

### Other requirements

This post will be subject to a satisfactory Enhanced DBS check carried out by Richmond AID.

### Main Tasks and Duties

1. To deliver specialist money advice for clients in debt, face-to-face, over the phone or on line, outreach sessions, or home visits as well as from our offices.
2. To provide negotiation, advocacy and support for clients where appropriate (e.g. with creditors, etc).
3. To work with other teams at and external organisations to provide a holistic service to

clients in benefits, energy and financial capability.

4. To undertake one to one debt counselling case-work with service users in financial difficulties – one off session or long term.
5. To support clients to learn money management skills on an individual basis.
6. To keep up to date with relevant legislation, policies and practices – this may include developing a specific area of expertise and acting as a resource for the wider staff team (e.g. Disability Benefits, Housing Law).
7. To provide income maximisation or financial capability support to clients linked to their specialist debt advice.
8. Carry out all requirements of the Advice Quality Standard so we can retain our Money Advice Quality Mark, including taking any training as required.
9. To work as part of a team to deliver the Money Advice Project.
10. Ensure marketing materials, leaflet, website content is up to date and the project is widely advertised and is accessible to a wide variety of clients.
11. To make referrals to partner organisations.
12. To recruit, train and manage volunteers.
13. Keep accurate records of all clients and maintain a database of client information, continue to update client records with progress and outcomes.
14. Complete all monitoring and evaluation as required by the funder and Richmond AID.
15. To provide advice and support through appointments at the Disability Action and Advice Centre, outreach sites and home visits.
16. To liaise and create effective working relationships with partner organisations.
17. Ensure that the project is compliant with the Social Model of Disability
18. Comply with Richmond AID's policies and procedures
19. Attend training and development as identified by you and your manager.
20. Attend team meetings and supervision.
21. You will need to travel within LBRuT as part of this post and occasionally may need to work outside of normal office hours including evening and weekends.
22. Any other work commensurate with the level of this post.