



Financial Capability Adviser

Job pack

Thanks for your interest in working within the Citizens Advice service. This job pack should give you everything you need to know to apply for this role and what it means to work within the Citizens Advice service.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of the Citizens Advice service
- Overview of the Advice Manager role
- Role Profile and Person Specification
- Our approach to Equity, Diversity & Inclusion (EDI)
- How to Apply



Our values

We are an inclusive, purpose driven workplace that listens, works together, is open and honest, accessible and helps everyone be the best they can be.

Purpose driven - we always focus on the people who need our help.

People focused - we recognise, value and reward contributions and talents in an open, fair, and meaningful way.

Collaborative - we build relationships across teams and locations to foster innovation and inclusive ways of working.

Transparent - we are open and honest, sharing information early and often whenever we can.



3 things to know about us

1. We're local and we're national. Citizens Advice have 5 national offices and offer direct support to people across England and Wales in 265 independent local Citizens Advice services including 5 offices within the New Forest.

2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

Overview of the Citizens Advice service

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 265 local Citizens Advice members.

This role sits within our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 7,700 local staff
- over 21,300 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30-minute drive of where they live.

Job Description

Job Title	Financial Capability Adviser
Reporting to	Advice Locality Manager
Salary	£24,350 rising to £26,350 (following the successful completion of probation)
Hours of work	37.5 (full-time)
Location	Flexible to suit applicant, with frequent travel across the New Forest area
Holiday	25 days per annum (pro rata) plus Bank Holidays
Key Responsibilities	Individual Financial Capability <ul style="list-style-type: none">To plan, deliver and facilitate basic financial education to help individuals make better budgeting, borrowing, saving and banking decisions, encouraging them to manage their finances more

	<p>effectively and take control before they reach a crisis point.</p> <ul style="list-style-type: none"> • Deliver one on one financial education sessions to clients who would benefit from more direct support than a group session • Record and report on session delivery and outcomes for individual clients in line with the project outcomes and Citizens Advice quality and other standards. • Ensure all client data is handled securely and in line with data protection requirements. <p>Group Financial Capability Training</p> <ul style="list-style-type: none"> • Develop a standard financial capability package for adult group sessions using existing resources • Develop key contacts to help publicise and host financial capability group sessions across the New Forest • Deliver group financial capability training sessions in the community across the New Forest • Link key attendees into CANF advice services and other services as appropriate • Monitor and record attendance as well as outcomes <p>Use of Systems & Technology</p> <ul style="list-style-type: none"> • Use laptop, photocopier, scanner, and other office machines as appropriate • Use various software applications as necessary for the work involved, e.g. MS 365, including Word, PowerPoint & Excel <p>Project Administration</p> <ul style="list-style-type: none"> • Relevant administrative and support duties required to ensure the smooth running of the project
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	<ul style="list-style-type: none"> Record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation. <p>Professional Development</p> <ul style="list-style-type: none"> Keep up to date with legislation, case law, policies and procedures relating to financial capability advice and undertake appropriate training Read relevant publications Attend relevant internal and external meetings as agreed with the line manager Prepare for and attend project related meetings, as appropriate. Maintain necessary records of professional learning and development achieved within the role Keep up to date with policies and procedures relevant to the role and undertake appropriate training
Other	<ul style="list-style-type: none"> Comply with the organisation's published policies and procedures. Uphold the aims and principles of the organisation. Undertake any other duties as might be reasonably required within the scope of the role. In accordance with Citizens Advice national policy the successful candidate may be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job. Complete induction and training as appropriate.

Person Specification

Essential Criteria

- Experience of working one on one with individuals whether in an advice or training environment.
- Experience of IT systems and packages such as MS 365 or similar
- Experience of working in a customer facing role.
- Ability to commit to and work within the aims, principles and policies of the Citizens Advice service.
- A good up to date understanding of equality and diversity and its application to the provision of advice and support to the public.
- Ability to use sensitive listening and questioning skills to get to the root of the issues and empower learners, whilst maintaining structure and control of meetings with them.
- Confidence to deliver engaging training on financial capability to group audiences using materials provided.
- Confidence with financial information used in financial capability sessions.
- A good standard of written and verbal communication skills.
- The ability to interpret information and present options to learners, thereby assisting them to take control of their finances.
- Ability and willingness to work as part of a team.
- A commitment to continuous professional development, including a willingness to develop knowledge and skills in financial advice topics.
- Ability to act on own initiative.
- Actively seeks and works with feedback to continually improve outcomes and quality standards.
- Ability to travel across the New Forest to deliver sessions and/or undertake individual sessions (will require own transport due to rural nature of district).

Desirable Criteria

- Knowledge of the Citizens Advice network and its advice frameworks.
- Knowledge of the issues faced by people due to the cost-of-living crisis.
- Experience of managing change and driving service improvements.
- Knowledge of safeguarding policies and procedures.

Additional Requirements

- The role requires frequent travel within the New Forest; hence a reliable means of transport is essential. Candidates who can drive and own a vehicle insured for business purposes will be well-suited for this position.

Equity, Diversity and Inclusion (EDI)

EDI is of strategic importance within Citizens Advice New Forest (CANF) and recognised as integral to all we do as a service.

Central to pursuing our EDI mission is building diverse and inclusive teams in which everyone has a sense of belonging. we particularly welcome applications from people we would like to see better represented in our organisation and sector - people of colour, LGBTQ+ people and disabled people.

We are also a flexible employer, so our roles may suit anyone who'd prefer a flexible arrangement to help their work/life balance.

How to Apply

Send your CV and a cover letter (maximum 500 words) or contact us for an informal chat, email: jobs@canf.uk

Closing Date: Friday 15th August 2025 (applications will be reviewed on a rolling basis).

Join us and help make a difference in the New Forest. Together, we can solve problems, advocate for change, and create a better future for everyone.