

Money Wellbeing Adviser

Job pack

Thank you 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 role
- Role Profile and Person Specification
- Our approach to Equity, Diversity & Inclusion (EDI)
- Further information and how to apply



Our values

Values to help us achieve our cultural ambition: 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 you should know about us

1. We're local and we're national. Citizens Advice have 4 national offices and offer direct support to people across England, Wales and the Channel Islands in 236 independent local Citizens Advice services, including 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 comprises a network of 236 independent local Citizens Advice charities across England, Wales and the Channel Islands, and the national charity. The role of the national charity is to enable local Citizens Advice to deliver their services and jointly deliver other services at a national level, including the website.

Citizens Advice provide support from:

- 511 local Citizens Advice offices in communities across England and Wales
- over 1,166 outreaches in local communities, such as GPs' surgeries, hospitals, libraries, prisons and community centres
- the Witness Service, available in 234 criminal courts across England and Wales

Across the whole of Citizens Advice, the service is delivered by around:

- 10,000 local staff
- 19,500 volunteers

We help millions of people every year with free, independent and expert advice across the broadest range of areas – from money and debt to benefits, housing, energy, work and so much more.



Overview of the role: Money Wellbeing Adviser

As Money Wellbeing Adviser, you will deliver high-quality money advice to individuals who have a history of financial difficulty and who have already received debt advice from our team. The goal of the project is to help the individuals break their cycle of financial difficulties and debt. You will join our friendly team, committed to helping people take control of their finances and build a more secure future through tailored advice and casework

We welcome applications from experienced advisers, as well as those looking to train in this vital area of work. Full training and support will be provided for the right trainee candidates.



Role Profile

Job Title	Money Wellbeing Adviser
Reporting to	Head of Strategic Development
Salary £26,300 - £28,000	Trainee Adviser £26,300 (FTE) with a salary review on successful completion of probation We welcome applications from experienced advisers, as well as those looking to train Salary will be reflective of experience
Contract	This is a permanent contract, subject to a probationary period of 3 months commencing on your start date. Funding for the project is currently secured until 31st January 2029 Successful completion of this probation is contingent upon satisfactory performance and completion of all required training for the role
Hours of work	37.5 hours per week (part-time applicants will also be considered)
Location	Flexible to suit applicant, with frequent travel across various locations throughout Hampshire
Holiday	25 days per annum (pro rata) plus Bank Holidays

Key Responsibilities:**Individual Money Skills**

- To plan, deliver and facilitate money skills advice sessions to help individuals make better budgeting, borrowing, saving and banking decisions, encouraging them to manage their finances more effectively
- Deliver one-to-one and group money skills sessions to vulnerable clients
- Continuously refine and adapt project resources and materials to better aid the delivery of money advice guidance to clients. 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

Use of Systems & Technology

- Use laptop, photocopier, scanner, and other office equipment as appropriate
- Proficiency using various software applications as necessary for the work involved, e.g. MS 365, including Word, PowerPoint & Excel

Project Administration

- Relevant administrative and support duties required to ensure the smooth running of the project
- Record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation

Professional Development

- 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

Other:

- Complete induction and mandatory training relevant to your role
- Keep up to date and work within our organisational key principles, policies & procedures
- Embed Equity, Diversity and Inclusion (EDI) in day-to-day work

- Work effectively both independently and collaboratively in teams
- Undertake any other duties as might be reasonably required within the scope of this role
- In accordance with Citizens Advice national policy, depending on the role, 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



Person Specification

Essential Criteria

- Understanding of the advice process, preferably with first-hand experience
- Excellent interpersonal skills, including the ability to engage, empathise, use sensitive listening and questioning techniques, manage frustration, overcome barriers to change and empower individuals to make informed decisions
- Ability to work in a person-centred way that balances empathy with empowering clients or learners to take control of their situation, including their finances.
- Confidence in delivering one-to-one and group training using provided materials.
- Good understanding of financial information, with the ability to interpret information, prepare budgets, carry out calculation, and present options clearly to support informed decision-making
- Excellent organisational, time management, verbal and written communication skills, including the ability to communicate complex information in a clear and accessible manner
- Strong IT skills, including experience using Microsoft 365, online applications, email, and other digital tools. Experience of using case management systems would be useful
- Ability to work independently, use initiative and operate effectively in community settings without close supervision
- Ability to maintain confidentiality, appropriate professional boundaries, and control of meetings while building positive relationships
- Ability to communicate effectively with colleagues, managers and stakeholders
- Ability to understand organisational priorities and work towards agreed objectives and quality standards
- Commitment to continuous professional development, actively seeking and responding to feedback to improve performance and outcomes

Desirable Criteria

- Knowledge of the Citizens Advice network and its advice frameworks
- Relevant and transferable experience supporting vulnerable, marginalised or disadvantaged individuals, including work in advice, training or customer-facing environments
- 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 Hampshire area 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.

Our approach to 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.

Further information & how to apply

If you would like to discuss this role further, please email jobs@canf.uk

To apply for this role, please send a CV and cover letter (no more 500 words) to jobs@canf.uk to explain how your skills and experience fit with the requirements of this role. **Applications will only be accepted on receipt of a CV and cover letter to this email address**

The closing date for this role is **Friday 21st August 2026** applicants will be considered on a rolling basis