

Citizens Advice Richmond

Volunteer Role Description – Financial Capability Adviser

Organised, approachable and adept at personal financial management? This could be the perfect volunteering opportunity for you...

We're looking for volunteers to join our Financial Capability team primarily to develop and present financial management sessions to local schools and community centres across the borough. Over time, there may be additional scope to also participate in delivering individual financial capability appointments across our offices.

As a Financial Capability Adviser, you will help develop courses that aim to improve peoples' financial wellbeing through drafting personal budgets, learning about financial services and products and becoming a more critical consumer. You may also be able to offer existing clients access to in-depth, one-to-one budgeting sessions, following up with accurate case recording.

Our Financial Capability Advisers are skilled individuals with experience and/or a strong interest in personal financial planning. We're looking for people who can draw up a budget from scratch, factoring in a range of personal variables and timeframes. You'll need great people and communication skills to deal with a diverse range of clients, as well as excellent IT skills particularly with Powerpoint.

With training and support, our volunteers have enjoyed and developed their roles over time and we look for new volunteers to join us for a minimum of 12 months, if possible.

All volunteers receive full Citizens Advice Financial Capability training as well as in house training in Money Advice tools and the Citizens Advice case recording system. There's also access to wider training opportunities within the national Citizens Advice service.

It's a challenging and exciting role for the right person, working with a dynamic and knowledgeable local team.

For an application form, email sid.li@citizensadvice-richmond.org.