



Citizens Advice Richmond is looking for a Trustee (Finance)

What will you do?

We are looking to recruit a Trustee to provide strategic financial oversight in support of our treasurer and help ensure the organisation's long-term sustainability. You will help us:

- provide financial expertise and guidance to the board on key assumptions and financial implications of budgets, operational, and strategic plans.
- review and scrutinize quarterly accounts, financial forecasts, and annual budgets alongside fellow board members.
- play an active role in relevant sub-committees (such as Finance, HR, or Premises), bringing a clear financial perspective to discussions.
- support the board and CEO in ensuring the organisation maintains an appropriate reserves policy.
- assist in reviewing annual accounts prepared in compliance with the Charity SORP, ensuring they meet Charity Commission and Companies House requirements.
- support the presentation of annual accounts at the Annual General Meeting (AGM) in an accessible way for volunteers, staff, and stakeholders.

In addition, you will:

- complete an induction for your role and maintain an awareness of how the local Citizens Advice is operating.
- contribute to the overall governance and strategic direction of a vibrant charity supporting Richmond residents.
- read papers for board meetings and attend six board meetings per year, as well as participating in relevant sub-committee meetings.



What's in it for you?

- use your experience to make a positive impact for people in your local area by ensuring the local Citizens Advice is sustainable and meeting the needs of the community
- meet people and build relationships with trustees, staff and other volunteers
- build on your governance, leadership and strategy knowledge and skills
- increase your employability



What do you need to have?

You'll need to:

- understand and accept the responsibilities and liabilities as trustees.
- have relevant financial qualifications or relevant experience.
- past experience of overseeing the finances and contributing to the overall management of an organisation with an income of at least £500k
- knowledge or experience of charity finance would be helpful but is not essential.
- be non-judgmental and respect views, values and cultures that are different to your own.
- have good listening, verbal and written communication skills.
- be able to exercise good independent judgment and if necessary to make difficult recommendations.
- be able to explain complex financial information in an accessible way.
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection.
- be willing to undertake training in your role.



How much time do you need to give?

You will need up to 15 hours per month for the regular activities, but this will vary according to the quarterly reporting and other factors.

Trustee boards usually meet in the evenings, and you'll likely need to give 12-15 hours per year to attend these. Sub-committees meet quarterly and a further 4-6 hours per year are required for these.



Valuing inclusion

Our volunteers come from a range of backgrounds, and we particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black Asian Minority Ethnic (BAME) communities.

If you are interested in becoming a trustee and would like to discuss flexibility around location, time, 'what you will do' and how we can support you please contact us.



Contact details

Please contact Lorna Reid on 0208 891 2145 or lorna.reid@citizensadvice-richmond.org for a chat about the role.

To apply, please complete our application form and indicate that it is the trustee treasurer role you are interested in, many thanks.

[Become a Trustee – Citizens Advice Richmond](#)