

## **Money Mentor Job Description & Person Specification**

**Role title:** Money Mentor

**Terms:** Employee/Volunteer

**Hours:** (as appropriate)

**Location:** (as appropriate)

### **Principal purpose:**

The role is to work with clients to assist them with their debt or other money problems, including budgeting help, and to support them in implementing debt solutions.

**Reporting to:** (as appropriate)

### **Responsibilities**

- Provide a warm and welcoming atmosphere to clients
- Engage and build rapport with a variety of clients
- Work with clients to make a thorough analysis of their problems and concerns
- Help clients to create a budget plan, to which they feel able to commit
- Signpost or refer clients to any other sources of help or support, in particular the CMA Hub, which provides any required debt advice
- Regularly engage with CMA Hub through the relevant IT system (Catalyst), or other methods
- Support clients as they work through the agreed debt solution plan, as advised by CMA Hub, and help them to respond to correspondence/calls concerning the plan
- Provide clients with the information and tools to enable them to make sound financial decisions in the future
- To keep accurate and up to date records of each client meeting using an online client management system
- To operate within the code of practice, policies and procedures of the service
- Undertake appropriate training
- Attend team meetings

### **Personal qualities and skills**

- Empathetic, non-judgmental and a good listener
- Able to relate to a wide range of people
- Good communication skills both verbal and written
- Willing to learn new skills
- Understand the importance of confidentiality
- Methodical
- Be honest and act with integrity
- Able to work with computerised systems
- A reasonable level of numeracy and literacy
- Appreciate the importance of working within policies and procedures
- Able to stay objective and avoid becoming personally involved
- Be a team player
- Hold a full clean driving licence