

Money Adviser

Locations:	The Old Library, Church Road, Addlestone, KT15 1RW, Sunbury Library, Staines Rd West, Shepperton, Sunbury- On-Thames TW16 7AB, as well as outreach locations in Spelthorne and Runnymede
Closing date:	4th September 2026 17:00
Interview:	In person
Hours:	37 hours / week, part-time hours available
Salary:	£27K - £29K per annum, dependent on experience £25K - £27K per annum for trainee Money Adviser
Contract type:	An initial 12-month fixed term contract, with the possibility of renewal to a Permanent contract
Reporting to:	Lead Money Adviser

Thank you for your interest in working at Citizens Advice Runnymede and Spelthorne (CARS). We are excited to have been granted 4-year funding in 2025 from the **National Lottery Community Fund** to set up and run a money advice hub from our offices.

This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice Runnymede and Spelthorne.

In this pack you'll find:

- The purpose of the role
- Our Values
- Overview of the of the Citizens Advice service
- About Citizens Advice Runnymede and Spelthorne
- The role profile and person specification

After reading this job pack, if you would like to proceed with an application, please send your CV along with a Personal Statement detailing how your skills and experience fit each of the Person Specification Criteria outlined in this job pack (pages 8 and 9) to recruitment@randscab.org.uk by 17:00 on 4th September 2026. If your application is shortlisted, you will be invited to an interview in September 2026. If you do not hear from us within 2 weeks of the closing date, this means your application has not been successful on this occasion. We reserve the right to close the vacancy early if a large volume of applications is received.

We value diversity, promote equality and challenge discrimination. We encourage and welcome applications from suitably skilled candidates from all backgrounds. Members of the recruitment panel will consider information you provide against the person specification for the role to decide whether you will be shortlisted for an interview.



Purpose of the role

- To deliver advice by telephone and face to face to residents of Surrey providing comprehensive and full range of money/debt advice in line with Financial Conduct Authority regulation and Debt Advice Quality Framework.
- To deliver money advice support across Citizens Advice Runnymede and Spelthorne (CARS) staff and volunteers.
- To promote and develop good money/debt advice practice within CARS.
- To promote and deliver the money advice service of the organisation by attending outreach locations and clients' homes where required.



Our values

We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.



3 things you should know about us

1. We're local and we're national. We have 6 national offices and offer direct support to people in 279 independent local Citizens Advice services across England and Wales.

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 300 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:

- 6,500 local staff
- over 23,000 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.

Citizens Advice Runnymede and Spelthorne (CARS)

Citizens Advice Runnymede and Spelthorne is a registered charity and a member of Citizens Advice. Our office helps over 8,000 people every year with over 20,000 different issues. We are an expanding local charity with 22 staff members working alongside 40 volunteers to provide advice across Runnymede, Spelthorne and nearby boroughs. We are a local charity at the heart of our community entirely funded by grants and donations, and a member of the national Citizens Advice network. We are proud of the high-quality service we provide to our clients, empowering people to help themselves and find a way forwards as well as shape a society where people face far fewer problems.

What we give our staff:

- Fantastic opportunities to launch and develop careers in the voluntary sector developing a wealth of useful knowledge, skills and experience
- Excellent training opportunities
- An organisation that is committed to its employees, valuing their knowledge, well-being, creativity and flexibility
- The chance to work with amazing people within a nationally recognised charity
- 5 weeks holiday (pro-rata for part-time staff) plus bank holidays
- A pension scheme with an employer contribution of 5%

Role profile

Money Advice Delivery

- Provide comprehensive debt/money advice in line with the Financial Conduct Authority regulations including the Consumer Duty, and Debt Advice Quality Framework
- Provide advice in income maximisation, benefits, budgeting, financial capability and housing
- Complete Debt Relief Orders on behalf of clients (if accredited)
- Use your interpersonal skills to explore, listen and understand complex problems as they affect each individual and tailor approach to advice accordingly
- Visit Outreach locations to deliver advice and if required clients' homes
- Provide a clear plan of action and follow-up on actions relating to cases as appropriate
- Identify and escalate serious problems, including safeguarding, appropriately
- Ability to work on own initiative as well as within a team
- Support clients via telephone and in outreach venues
- Commit to ongoing training/development
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.
- Maintain detailed case records for the purpose of continuity of advice, information retrieval, statistical monitoring and report preparation.
- Complete the required training to comply with quality assurance processes
- To carry out community outreach projects in the boroughs in which we work as required

Research and campaigns

- Support our research and campaigns work through various channels including case studies, data collection and client consent
- Assist with Research and campaigns work by providing information about clients' circumstances through the appropriate channel
- Keep up to date with research and campaign issues and ensure research and campaigns is promoted and integrated in a way relevant to the role

Professional development

- Keep up to date with legislation, policies and procedures and undertake appropriate training
- Keep up to date with Citizens Advice aims, principles and procedures and ensure these are followed
- Read relevant publications
- Attend relevant internal and external meetings as agreed with the line manager
- Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate
- Complete the in-house Generalist Adviser certificate training (if not already achieved) to strengthen knowledge across all Citizens Advice advice areas.

Administration

- Use telephony and IT equipment for multichannel delivery of advice services
- Use IT software for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production
- Ensure that all work conforms to the organisation's systems and procedures

Other duties and responsibilities

- If and when required, give advice to clients via telephone (e.g. Adviceline) on other advice areas beyond debt/money advice
- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of CARS advice service
- Attend events to promote the services of the organisation (out of office hours on occasion)
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- Create a positive working environment which equality and diversity are well managed, dignity at work is upheld and staff can do their best



Person specification

Essential

1. Hold an up-to-date Generalist Adviser certificate (Citizens Advice or equivalent) or completed debt/money advice trainings that are accredited by the Money and Pension Service (MaPS); those who do not have this prerequisite will be recruited as Trainee Money Adviser
2. Proven ability to interview clients using sensitive listening and questioning skills to get to the root of issues and empower clients, whilst maintaining structure and control of meetings
3. Knowledge of multiple enquiry areas (ie debt, benefits, housing, employment, financial capability)
4. Ability to research, analyse and interpret complex information and produce and present clear reports verbally and in writing
5. Ability to understand statistics and check accuracy of calculations
6. Ability to communicate effectively verbally and in writing
7. Ability to make use of telephony and IT systems to deliver service
8. Proven ability to monitor and maintain service delivery against agreed targets and quality assurance
9. Ability and willingness to work as part of a team and to build excellent relationships in an external setting
10. A commitment to continuous professional development, including a willingness to develop knowledge and skills in other advice topics beyond debt/money advice
11. Ability to commit to and work with the aims, principles and policies of the Citizens Advice service

12. A good up to date understanding of equality and diversity and its application to the provision of advice

13. Ability to prioritise own work to meet deadlines and manage workload

Desirable

1. Accredited money/debt adviser (either Citizens Advice training, Wiser Adviser training or equivalent)

2. Appreciation of the local community and social challenges in the area

Other requirements

1. Car insurance that covers occasional business use

2. Pass the Enhanced DBS check

3. To take up this post you must have the right to work in the UK. Please note that Citizens Advice does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

Criminal Convictions

Having a criminal record will not necessarily bar you from working for Citizens Advice– much will depend on the type of job you have applied for and the background and circumstances of your offence.

For some posts, an offer of employment will be subject to a Disclosure and Barring Service (DBS) check. If this applies to the post for which you are applying, this will be noted in the application pack.

Please note in your Personal Statement whether you have had any previous convictions not regarded as spent under the Rehabilitation of Offenders Act 1974. If so, please provide details of the offence and the date of conviction.

Citizens Advice Runnymede and Spelthorne
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