



Thank you for your interest in working at Citizens Advice Bury & Bolton. 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 Bury & Bolton.

The Role

Job title	Money Advice Adviser (trainee considered)
Salary	Trainee £23022 - £24750 Adviser £25000 - £27500 (dependent on experience and qualifications)
Contract	Permanent
Hours	35 hours per week (part time and other flexible working requests are considered)
Location	Hybrid: at least 60% office & remote 40% (once initial competency training is completed, approx. 16 weeks)

We believe inclusion is a social justice issue - a principle that underpins our EDI work. To that end, 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.

Want to chat about the role?

If you would like an informal chat about the role or the application process, please use this [link](#) to book in a MS Teams or phone call with our HR team.

Application Process

Submit your online application using this link, along with a copy of your CV and cover letter by 6th June 2025

Your cover letter should be no more than 1 page and should answer the following questions;

- 1) Why do you want to work at Citizens Advice Bury & Bolton
- 2) How will your skills, knowledge and experience meet the person specification and key responsibilities of the role

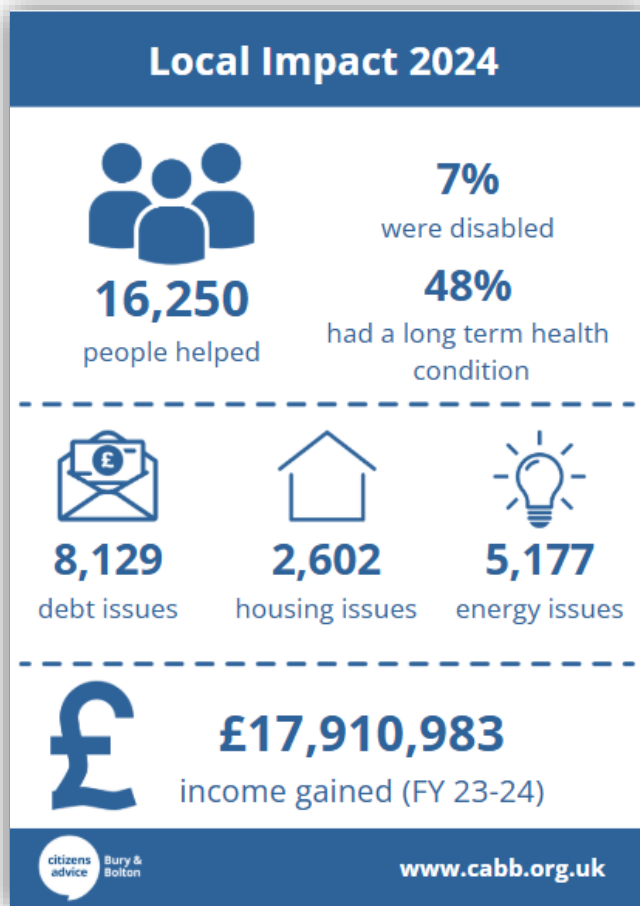
Interviews (1 stage only) will be held w/c 16th June

Please note any applications submitted without CV & Cover Letter will not be considered. We do not offer feedback at application stage.

Citizens Advice Bury & Bolton (CABB) – About Us

We are a dedicated local charity committed to offering free, confidential, and impartial advice, information, and support to individuals across Bury & Bolton (with some out of area services). Whether individuals are facing a single issue or a complex set of problems we provide personalised one-to-one advice.

Our latest headline stats and client comments:



"My adviser was very supportive and friendly. Without Citizens Advice I don't know where I've have gone for help."

citizens advice Bury & Bolton

"The service was really helpful. No one else gave me the help or time that Citizens Advice did."

citizens advice Bury & Bolton

Quality of advice, independence and accreditation are an important core element of our services. We are proudly accredited by:



We value diversity, promote equality and challenge discrimination.

We are committed to putting equality and equity at the heart of everything that we do, with the overarching aim of being the go-to charity for anyone across Bury & Bolton in need of help, to find a way forward. This means we look at improving access, treating people with empathy and promoting an inclusive working environment for all of our colleagues.

Find out more about us via:

[Our website](#)

[Citizens Advice Campaigning Site](#)

[National Citizens Advice Website](#)

Role Purpose

Citizens Advice Bury & Bolton (CABB) is a leading provider of legal advice and information, supporting thousands of clients every year. We are a busy, client focused and dynamic service with a track record of delivering high quality advice face to face, over the phone and digitally.

Our communities are facing unprecedented challenges with rising costs. The rising cost-of-living continues to directly impact individuals and families, with more people than ever in negative budgets and debt.

Our Money Advice team provide support and empower vulnerable clients to manage their income, maximise income and assess their best strategies and options to address debt issues long-term.

There's no 'average' case – advice is tailored, and each client is treated equally. It can sometimes be a challenging role, but you will be fully trained and supported, working as a key part of an approachable and supportive team in a rewarding environment – and working alongside an established team of social welfare law advisers, within our money advice team.

This is a fantastic opportunity for personal and professional development, where you will be fully trained and supported in this role, both through national 'classroom' based training, on the job shadowing and internal training, and other development opportunities, including opportunities to obtain the Certificate in Money Advice Practice (CertMAP); the leading debt advice qualification for debt advisers in England, Wales and Northern Ireland. While some knowledge and experience in advice is desirable, it is not essential due to the training provided.

About you:

- Excellent interpersonal skills to engage with a diverse range of clients,
- Organisational skills with the ability to adapt, prioritise deadlines and competing tasks in a fast-paced environment,
- A genuine passion for continual professional development,
- Be empathetic and compassionate,
- Be resilient and adaptable.

Role Profile

Key accountabilities	Key elements & tasks
Service Delivery – Working with clients	Provide high quality money & debt advice to clients, assessing and effectively diagnosing clients' money advice and debt needs; delivering one-off specialist money advice and casework.
	Guide and empower clients – explaining options and implications to help clients make informed decisions about their next steps
	Advise clients on sustainable budgeting, income maximisation and money management, in line with Financial Conduct Authority (FCA) guidance.
	Support client to maximise household income – referring for additional/ ongoing support in line with referral pathways.
	Communicate and negotiate with creditors to achieve sustainable repayment agreements. Support client to apply for assistance, charitable grants and make appropriate referrals where appropriate.
	Process charitable applications, collect and review evidence.
	Maintain clear case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation (using national case management system, Casebook).
	Regularly review cases, ensuring all key dates/ deadlines are met, while maintaining contact with clients.
Performance, Personal Management and Administration	Achieve performance targets required of the adviser post (KPIs) and ensure that the advice given meets the standards of; Citizens Advice Quality Assurance Framework Money & Pension Service (MaPS) Advice Quality Standard (AQS)
	Take ownership for monitoring own workload e.g. proactively reviewing when new cases are taken on, progress on current cases, outcome of completed cases and quality control (through file reviews and quality of advice assessments).
	To comply with operational management systems of supervision, objectives, appraisal and induction; including engagement with constructive engagement/ feedback.

	To comply with data collection procedures and reporting to ensure effective recording of performance monitoring, outcomes and client information on CRM systems.
Service Development, Research & Campaigns	Assist with the development of the service locally, regionally and nationally, publicising work as and when necessary.
	Work with colleagues to maintain a positive working and learning environment, in which equality and diversity are well managed, dignity at work is upheld and volunteers achieve their full potential.
	Carry out other tasks within the scope of the post to ensure the effective delivery and development of the role.
	Monitor advice enquiries, contributing to research and campaign projects locally, and across the Citizens Advice network through evidence forms, spotting trends and explaining research & campaigns to clients.
Personal Development & Training	Actively participate in Money Advice training programmes, with a view of achieving full competency within 9 months (on average).
	Ensure through reading, training and consultancy, that your own level of knowledge around money advice law is up-to-date and that this is disseminated as appropriate.
	To identify your own training needs in conjunction with the designated lead/ supervisor and be prepared to undertake appropriate training in line with your training and progression plan.
Other duties and responsibilities	Uphold the aims and principles of CABB and our EDI/ policies.
	Liaise, as appropriate, with relevant outside agencies (voluntary and statutory), other Local Citizens Advice offices and other stakeholders.
	Be an active member of the wider team, acting and support colleagues in a collaborative way.
	To comply with all published organisational policies and procedures.
	Work flexibly to undertake such other reasonable duties and responsibilities.

Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the job and is not included to be an inflexible list of tasks.

The Citizens Advice Service is a fast-moving organisation and therefore an employee's duties may be varied from time to time. The post holder accepts that they may be required to work flexibly and undertake any other work or duties as may reasonably be required, within the scope of and commensurate to the nature of the post.

Person Specification - desirable

Experience (through paid or voluntary work)

Minimum 1 years' experience, or equivalent in debt advice or financial services

Recent experience of giving information/ guidance to clients in the public or voluntary sector or a regulated environment such as financial services or consumer energy

Working with groups/ individuals who face complex barriers and disadvantages

Qualifications, Knowledge and Understanding

Demonstrable understanding and awareness of social welfare law and the relationship between money advice and other areas such as welfare benefits/housing

Holder of Certificate in Money Advice Practice (CertMAP), or commitment to achieve

Skills and Abilities

Ability to adapt communication and methods to ensure inclusivity

Ability to prioritise and organise workload, both within a team and using own initiative to meet deadlines

Additional Factors

Ability and willingness to work flexibly to ensure high quality service is delivered

Understanding of and commitment to, aims and principles of the Citizens Advice service locally and nationally

What we give our staff

We value the people who work here. As well as things like annual leave and our workplace pension, working at Citizens Advice means getting access to several benefits.

[Citizens Advice Bury & Bolton employee benefits package.](#)

We are proud to be a **Real Living Wage Employer** and a **Supporter of the Greater Manchester Good Employment Charter** – a voluntary membership and assessment scheme which has been created to improve employment standards across all GM employers, regardless of size, sector or geography. We are working towards becoming full members.



Equality, Diversity, Inclusion & Belonging

Equity, Diversity, Inclusion & Belonging (EDI&B) is of strategic importance within the organisation and recognised as integral to all we do as a service.

Central to pursuing our EDI&B mission is building diverse and inclusive teams in which everyone has a sense of belonging. We believe inclusion is a social justice issue - a principle that underpins our EDI&B work. To that end, 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 follow the social model of disability.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

Additional information

Please be aware that Citizens Advice Bury & Bolton is not a sponsoring organisation. Therefore, the successful applicant must already possess the right to work in the UK or be able to secure the right to work in the UK independently. Verification of your right to work will be undertaken for successful candidates.

Please see the [CABB website](#) for information on the following:

- Disability
- Entitlement to work in the UK
- Diversity monitoring
- GDPR: How we will use your information
- References
- Criminal Convictions/DBS.

We are the people's champion

We exist to shape a society where people face fewer problems.

We're driven:

By our ambition to make things better for people, individually and collectively as part of the Citizens Advice network

By the power of high quality, independent advice to help people solve their problems.

To change the underlying causes of problems, through working in partnership with local, regional and national organisations.

As a local service, we align ourselves to the Citizens Advice, organisation wide, missions

Provide advice fit for the future

We'll be there for people when they need us, in the ways that help make the biggest impact; such as providing support due to the continued cost of living crisis and ensuring income is maximised. Our specialist areas of advice focus on supporting individuals and communities who are most vulnerable and those who are locked out of the welfare system, or on the verge of being excluded

Close the gap

We'll work to end disparities in access and experience for marginalised people, through proactive partnership working, community engagement and overcoming barriers to access.

Take early action

We'll endeavour to prevent more people reaching crisis by addressing problems earlier.