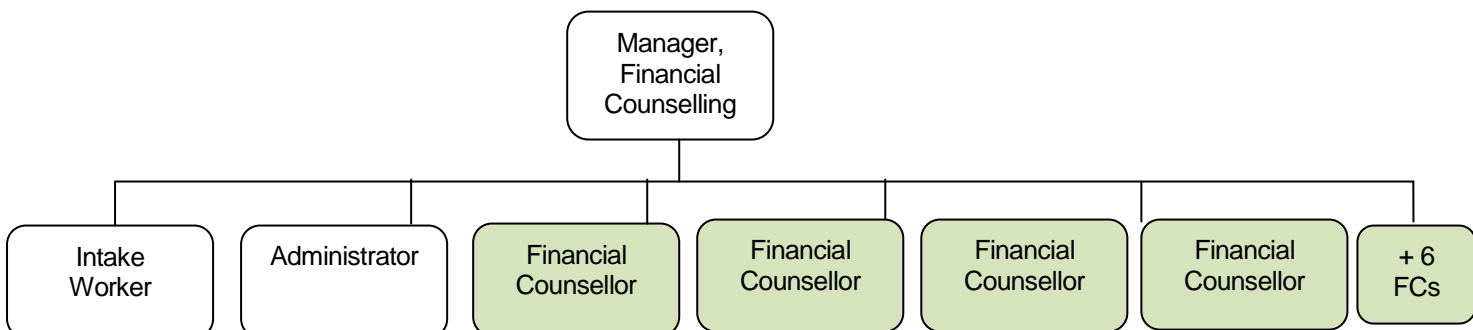


Position Description

Position	<i>Financial Counsellor - Money Help</i>
Reports to (position title)	<i>Manager, Financial Counselling</i>
Purpose:	<i>The role of the Financial Counsellor is to work as part of the MoneyHelp team, providing telephone based financial counselling, initial screening (triage), information, options and referral by telephone and email.</i>
Direct reports:	<i>0</i>
Indirect reports:	<i>0</i>
Scope	<i>The MoneyHelp service receives approximately 250 calls per week and opens approximately 200 files; Provides more than 8,500 financial counselling sessions per annum; Involves 8,500 service hours, including research and administration.</i>

Organisation chart:



Key Accountabilities/Responsibilities:

- Act as the primary point of contact for telephone financial counselling services for individuals seeking access or referral to a financial counsellor
- Assess and analyse the client's situation, and provide financial information and explanation of options to assist the client to address their situation and make informed decisions;
- Act as a triage worker, carrying out short screening interviews; assess whether the client requires general information, referral for a MoneyHelp telephone financial counselling session, or referral elsewhere;
- provide information to clients as necessary via telephone and/or email;
- collect client data and maintain file records;
- provide occasional outreach services;
- mentoring and peer support for trainees, other Financial Counsellors and new team members;
- identify legal and policy issues arising from Financial Counselling work and participate in Consumer Action's broader policy and advocacy initiatives.

Qualifications/Experience/Specialist Skills:

- In order to undertake work as a financial counsellor, incumbents must hold a Diploma of Community Services (Financial Counselling), and/or be eligible for membership of the Financial and Consumer Rights Council, or have the ability to quickly acquire the Diploma, or (in the case of a trainee) be studying toward the Diploma;
- Deep technical knowledge and some paralegal skills in particular concerning credit and debt issues affecting clients and their rights and obligations;
- Specialist skills required include intermediate computer literacy including familiarity with database and/or file management software, MS Office, and sound touch typing skills;
- Experience in the use of a switchboard and/or telephone based information service;
- Experience in the community sector and/or in the provision of legal or welfare information services.

Competencies

- The Financial Counsellor requires highly developed active listening and communication skills including the ability to empathise and to manage potentially challenging clients in stressful and emotionally charged situations;
- Ability to think quickly and to prioritise tasks under pressure;
- Flexible, pro-active and resilient attitude, including the ability to work under direction;
- The ability to communicate complex information in a practical, accurate and understandable manner;
- Demonstrated ability to work within a counselling framework and to recognise the way in which other issues may interact with personal financial issues;
- A demonstrated interest in and commitment to social justice, including awareness of issues such as homelessness, mental health, family violence, disability, drug and alcohol problems and criminal activity.