

## Position Description

Position	<i>Financial Counsellor</i>
Reports to (position title)	<i>Team Leader Financial Counselling Practice</i>
Purpose:	<i>The role of the Financial Counsellor is to work as part of the National Debt Helpline (Victoria) team, providing telephone financial counselling, initial screening (triage), information, options and referral by telephone, web-based chat, and email.</i>
Direct reports:	<i>0</i>
Indirect reports:	<i>0</i>
Scope	<i>The financial counselling practice at Consumer Action Law Centre is the main operator of the National Debt Helpline for the state of Victoria. The financial counselling service receives approximately 350 calls per week and opens approximately 150 files.</i>

### Organisation chart:



### **Key Accountabilities/Responsibilities:**

- Act as a triage worker, carrying out short screening interviews; assess whether the client requires general information, referral for an extended telephone financial counselling session, or referral elsewhere;
- Provide information to clients as necessary via telephone, chat and/or email;
- Provide more extended financial counselling in booked sessions;
- Maintain accurate and reliable data through initial completion of screening questions and file system maintenance;
- Provide occasional outreach services;
- Identify legal and policy issues arising from Financial Counselling work and participate in Consumer Action's broader policy and advocacy initiatives;
- Senior financial counsellors will also mentor trainees and provide peer support for trainees, and other Financial Counsellors and new team members.

### **Qualifications/Experience/Specialist Skills:**

- Applicants must hold the Diploma of Community Services (Financial Counselling), and be a member of the Financial and Consumer Rights Council of Victoria;
- Sound technical knowledge and some paralegal skills in particular concerning credit and debt issues affecting clients and their rights and obligations;
- Technical administrative 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 telephone-based information service;
- Experience in the community sector and/or in the provision of legal or welfare information services.

### **Competencies**

- Advanced listening and communication skills, including the ability to tailor and modify communication to a range of audiences;
- The ability 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 to clients 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;
- Demonstrated practice of showing consideration, concern and respect for others' feelings and ideas; accommodating and working well with the different working styles of others and treating all people with dignity and respect.