



APPRENTICE MONEY ADVISOR

Job Description and Person Specification
April 2025

The Wrekin
Housing Group

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Apprentice Money Advisor

Responsible To: Debt & Energy Manager

Job Purpose:

- Gain skills and knowledge as a Money Advisor through a Debt Advisor Level 3 qualification, training, and supervision
- Develop expertise in welfare benefits, regulated debt advice, budgeting, and financial crisis support
- Learn to provide FCA-compliant debt advice, helping customers achieve financial stability
- Support the promotion and improvement of financial inclusion services
- Advocate for clients, negotiating with partners and creditors to help them manage finances and sustain tenancies

What you will gain:

- On-the-job training and mentorship from experienced professionals
- A nationally recognised qualification in Money Advice
- Practical experience in a real working environment, developing key skills
- Career progression opportunities upon successful completion of the apprenticeship
- A supportive and welcoming team that values compassion, commitment, and collaboration

Key Responsibilities:

- You will support the team to deliver comprehensive, impartial debt and money management advice and casework to tenants and customers in partnership with the wider Money Matters Team
- With supervision and support from colleagues, you will learn how to efficiently manage and progress a caseload, ensuring case mgmt. systems are kept up to date
- You will learn about debt/money legislation and best practices to internal teams, to enhance our income collection strategies
- You will support the Debt & Energy Manager to proactively promote the debt advice service to internal stakeholders, customers, and external partners

Customer Support & Financial Guidance:

- Assist customers in maximising income using software tools and support from Welfare Benefits Advisors
- Engage sensitively with clients, conducting assessments and completing required documentation
- Shadow and learn from the Debt & Budgeting Team to provide holistic, unbiased financial advice
- Support customers of all ages in improving financial wellbeing and managing debt
- Develop skills in interviewing, listening, and assessing client needs to provide appropriate support



Debt & Budgeting Assistance:

- Learn to facilitate debt relief options, including form completion, letter drafting, and advocacy
- Empower clients to take control of their finances and set their own priorities.
- Provide guidance on budgeting, banking, grant applications, and liaising with third parties
- Encourage engagement from referred clients and signpost them to relevant services

Casework & Administrative Duties:

- Manage daily administrative tasks, including communications with clients and creditors
- Maintain accurate case records, ensuring quality standards and confidentiality
- Support the team in delivering high-quality services across multiple communication channels

Collaboration & Professional Development:

- Work alongside Housing colleagues to balance tenant needs with business objectives
- Stay updated on legislation, policies, and best practices through training and development
- Assist in service improvement and promotion, representing the organization at events
- Adhere to policies, data protection, and confidentiality requirements while supporting service delivery
- Gain insight into external partnerships and community support initiatives through job shadowing and training

Person Specification

Apprentice Money Advisor

Qualifications:

- Minimum 2 GCSE passes in English Language and Mathematics at Grade 4 or above or equivalent

Knowledge, skills, and experience:

- It is highly desirable to have employment, voluntary or lived experience of debt and financial exclusion within low-income communities
- You will need to demonstrate good verbal and written communication skills
- The desire to help an individual reach their full potential
- Be a 'people person' with the ability to build rapport and be sensitive to needs of customers who are facing crisis and may have multiple and complex needs
- Be flexible, self-motivated, enthusiastic, and resilient with an excellent attention to detail
- It is highly desirable to have an understanding of welfare reform issues
- A positive can-do approach to problem solving and challenging situations, and a drive to analyse and understand complex problems
- Have the confidence to support the promotion of our services to a range of customers and stakeholders, including face to face and video communications
- The confidence and skills to use a wide range of IT packages, including word processing / spreadsheet / database / excel / online portals
- Be self-motivated, and able to work well as part of a team
- Full driver's license and have access to a vehicle for business use
- It is highly desirable to have previous employment history working in an advice or financial setting

Values:

- **Inspire positive change**

We embrace innovation. We are not afraid to go the extra mile to provide even better services.

- **Everyone matters**

People are at the heart of our team and every team member across the whole community counts.

- **Communicate clearly**

We respect colleagues and customers while recognising the importance of open conversations.

- **Grow together**

We support each other and take pride in our collective success

Competencies to achieve:

- Supports and shares information with team colleagues, actively participating in decision-making and problem solving to improve services
- Assists in identifying problems, offering appropriate ideas to resolve them and displaying a 'can do' approach to work tasks
- Plans individual work tasks to meet deadlines. Keeps manager and other involved parties informed of progress
- Demonstrates judgment and the ability to contribute to decision-making at a local level. Seeks advice and information when appropriate
- Is aware of main company objectives, demonstrating flexibility in task management and priorities as required. Contributes ideas to facilitate change and improve services