

Financial Counsellor

Bobby Goldsmith

Foundation

Position Description

Effective: 15 August 2019

Position Title:	Financial Counsellor
Reports to:	Client Services Manager
Authorised by and date:	CEO, October 2018
Classification level:	SCHCADS Award, Level 5 (Pay point subject to experience)
Roles reporting to this one:	Nil
Appointment Status:	Permanent part time being 45.6hrs per fortnight (.6 FTE)
Position Purpose	<p>The Financial Counsellor is a member of BGF's Client Services team. The position exists to provide high quality assistance to BGF clients who are in financial distress. The Financial Counsellor has responsibility for:</p> <ul style="list-style-type: none"> • Provision of financial counselling services; • Program Development; • Operational Management; • Partner Relationship Management.
Financial Counselling Services	<ul style="list-style-type: none"> • Provide a full assessment of a client's financial circumstances and other issues that impact their situation; • Provide information and strategies on financial matters and how clients can prevent getting into financial difficulties in the future; • Provide information on various forms of governmental assistance available; • Identify problems in relation to client's use of credit • Advocate on behalf of clients and negotiate with creditors on their behalf. Where possible encourage clients to advocate and negotiate on their own behalf; • Educate clients of their rights and responsibilities in relation to lending practices, harassment and intimidation, debt recovery and the Credit Code; • Work with fellow case workers, case managers and other relevant service providers to develop Individual Support Plans to support clients; • Refer clients internally to caseworkers for financial assistance in accordance with the Financial Assistance Guidelines; • Refer clients externally to relevant welfare and legal services for advice and support; • Deliver services in a range of formats and media, as appropriate.
Program Development	<ul style="list-style-type: none"> • Build upon existing program in new and creative ways to better engage existing and potential clients living outside of the Sydney inner-city region; • Develop and deliver programs and workshops relating to budgeting and money management;

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	<ul style="list-style-type: none">• Conduct community education seminars and similar activities on debt and credit issues;• Contribute towards the design of, and consider results of BGF's annual client satisfaction survey;• Extract data, analyse and deliver reports to Client Services Manager and Executive as requested;• Provide data for quarterly KPI reporting to NSW Health timeously or as required from time to time;• Provide client services workers with up-to-date information on developments in credit legislation, debt recovery processes, bankruptcy etc.
Operational Management	<ul style="list-style-type: none">• Maintain compulsory accreditation as a Financial Counsellor with FCAN and adhere to all relevant legislative requirements;• Establish, update and maintain client records and files so that client needs are accurately recorded and effectively handled, ensuring that statistics are available on a timely basis and information is up to date and accessible when absent;• Be an internal resource for BGF Caseworkers and Case Managers in relation to all matters pertaining to financial counselling, including educating them about the risks associated with them providing financial advice;• Undertake a periodic review all services and their effectiveness in delivering KPIs;• Responsible for own day to day administration e.g. travel, correspondence, appointments, record-keeping;• Contribute to annual planning and budget preparation, and to monthly, quarterly and annual reporting
Partner Relationship Management	<ul style="list-style-type: none">• Participate in Case Management conferencing activities as the BGF representative• Ensure partners provide an agreed level of service, advice or support to BGF clients• Build and maintain effective working relationships with partners• Establish and maintain protocols for working with partners to deliver agreed levels of support, service and advice to clients e.g. case conferences
Other Responsibilities	<ul style="list-style-type: none">• Attend regular supervision sessions, as required;• Attend and participate in regular professional development activities;• Attend all interagency, staff and team meetings;• Perform all other reasonable duties as assigned by your Manager from time to time.

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Person Specifications	(E) = Essential (D) = Desirable
Qualifications	<ul style="list-style-type: none"> Tertiary qualification in financial counselling, finance or economics (E) Certified Financial Counsellor with FCAN (E)
Skills	<ul style="list-style-type: none"> Advanced skills in negotiating positive outcomes (E) Strong interpersonal relationship skills (E) High-level computing expertise in particular in programs such as Microsoft Excel, Microsoft Word, and other Office 365 applications (E) Developed problem-solving skills (E) Attention to detail (E) Highly numerate (E) Communication skills – clear articulation both in the written and spoken word (E) Strategic planning (D) Presentation skills (D)
Experience	<ul style="list-style-type: none"> Experience in Financial Counselling (E) – 5 years min Experience working within the NFP sector (D)
Personal Attributes	<ul style="list-style-type: none"> Personal values strongly align with BGF's values Strong ethical/moral compass Leadership – by taking full and clear responsibility for their performance and that of their area Highly organised and time efficient Ability to communicate complex information clearly and effectively in person Strong decision-maker Agent for positive change Team oriented and highly collaborative, however focused and deadline driven when required to work independently Valid, unencumbered drivers licence in NSW
Package	<ul style="list-style-type: none"> Tenured role Annual salary between \$75K and \$80K p.a. pro-rated dependent upon experience and skills; Superannuation contribution of 9.5% paid by BGF Salary packaging available 45.6 hour working fortnight (0.6FTE) based on a 76 hour working fortnight, worked over 3 days each week 20 days annual leave per annum with 17.5% leave loading, pro-rated 6 month probationary period Mobile phone provided Based in Surry Hills, Sydney, NSW

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