

Kirklees Citizens Advice and Law Centre

Job description

Job title

Pension Wise Guider

Reporting to

Financial Information Team Leader

Purpose of Job

To deliver a specialist quality service to customers eligible for the pensions guidance service who have complex pension scenarios by supplying accurate, personalised, relevant information and guidance on their pensions options and choices

Duties and Responsibilities

Main Duties

1. Provide face to face pension and retirement information and guidance to members of the public, in line with the defined Pension Wise service.
2. To help consumers to understand the full implications of their pension choices using appropriate skills, including numerical.
3. To raise consumer awareness of pension scams and fraudulent activity, to encourage consumers to report any issues to the relevant authorities and to report potential scams and fraudulent activity through appropriate internal channels.
4. Respond proactively to consumer demand, working to agreed service delivery standards.
5. Provide timely and accurate follow up information that adds value to the consumer and is clear and easy to understand.
6. Contribute towards shared best practice within KCALC and across the local Citizens Advice (LCA) network.
7. Ensure that all work conforms to the Pension Wise quality standards, including undertaking peer to peer observations for quality assurance purposes, where applicable.
8. Ensure that all required management information is both captured and reported on a timely basis.
9. Complete training, continuous professional development and other requirements to gain and maintain accreditation.
10. In addition, you may be required to carry out ad hoc projects to improve the service we provide, attend meetings or workshops and support promotional activity for the service, within the scope of the role.

Research and Campaigns

- a) To be alert at all times to the social policy implications of issues presented by clients.
- b) To take appropriate action, with our Research and Campaigns team to influence social policy with regard to these issues.

Equal Opportunities

- a) To have regard at all times to the planning and execution of duties to the Equality and Diversity Policy. In accordance with the Equalities Act, reasonable adjustments will be made to facilitate the employment of disabled people.
- b) To ensure equality of access to the services provided to all potential clients wishing to access the services.

Special Features

In addition to the tasks and duties listed in the job description, to undertake such duties as may be identified and which are generally compatible with the functions for the post.

Organisational Ethos and Expectations

As part of their role with Kirklees Citizens Advice and Law Centre all staff to :

- Have a commitment to the aims, objectives and ethos of the organisation, and follow policies, procedures and systems.
- Keep the clients' needs at the centre of all the organisation's activity, seeking to deliver the best possible service within resource and operational constraints
- Communicate well and appropriately with colleagues and clients, keeping others informed and consulting as much as possible
- Have a professional attitude, being flexible, supportive and cooperative in working together with other staff members and volunteers.
- Show respect for all colleagues, volunteers and clients in how they speak and act and always behave in a non-judgemental way
- Be willing to learn, accept constructive feedback, adapt to change, always aim to improve efficiency and quality, and take responsibility for their own work.