

## **Financial Counsellor**

### **Position Description**

#### **General**

The financial counsellor is employed to:

- Provide financial counselling, information, options and referral to financially and socially disadvantaged people, with particular priority given to people who are disadvantaged as a result of language, literacy skills, geographical isolation, low income, disability or related factors, and people in custody. Financial counselling may be through different channels - telephone, web based live chat, teleconferencing, email and in person.
- Resource and support financial counsellors in the community.
- Provide advocacy and assistance to callers to assist them to resolve their financial problems where resources permit.
- Refer callers to local financial counselling services where appropriate.

The role is performed within the framework of the aims, objectives, policies and procedures of Financial Rights Legal Centre (the Centre).

#### ***Reporting Relationship***

The financial counsellor reports to the Senior Solicitor appointed to head their team.

#### ***Working Relationships***

The financial counsellor is required to liaise with:

- Director of Casework- escalations regarding casework, phone supervision (per roster) and ad-hoc functional queries;
- Director of Advice – Roster, escalations regarding rosters, phones or advice, phone supervision (per roster) and ad-hoc functional queries;
- Senior Solicitors – Phone supervision (per roster) and ad-hoc functional queries if line manager is not available;
- Solicitors / Financial Counsellor –help build team comradery with peers, attend team meetings and staff meetings; and
- COO/ Admin – for all administration tasks such as stationery requests, technical support (phone & IT) and leave requests.

## **Duties**

1. Answer the telephone advice lines and respond to live chat, email and in person enquiries. The advice lines include but is not limited to: National Debt Helpline Sydney, Mob Strong Debt Help (a dedicated national First Nations hotline), and Caseworker Hotline (for external financial counsellors and community workers).
2. Make an initial assessment of the client's financial situation.
3. Encourage clients to advocate and negotiate on their own behalf where appropriate and to develop the necessary skills to address their situation. Refer clients to website resources.
4. Where appropriate, provide financial counselling, including information, options and referral to a financial counsellor in the client's local area as appropriate.
5. Provide advocacy for clients meeting the Centre's intake criteria as either one-off task assistance or ongoing casework (representation). Casework intake should be guided by the Centre's strategic priorities.
6. Seek advice and assistance from the solicitors where appropriate.
7. Participate in the policy work of the Centre including active participation in regular casework meetings, providing feedback to their manager and policy staff on the trends and issues arising in casework, writing or contributing to letters/submissions regarding policy issues and legislative reform, providing comment and feedback on policy positions, submissions, publications and other related activities.
8. Work co-operatively with the Centre's legal staff and/or the Mob Strong Debt Help team to provide multi-disciplinary assistance and representation to the Centre's clients to assist them to resolve their financial problems.
9. Where a client has an issue outside of the organisation's areas of expertise, refer to external agencies as appropriate (for example, Legal aid, emergency relief, counselling, housing).
10. Provide support to financial counsellors or caseworkers in other agencies who call the Caseworker Hotline.
11. Participate in the delivery of community legal education and other professional development activities designed to resource financial counsellors as required, particularly regional financial counsellors.
12. Comply with the Community Legal Centres' Risk Management Guide as applicable, including but not limited to confidentiality, conflict checking, maintaining client files at a high professional standard and entering all client records into the designated database.
13. Acquire and/or maintain accreditation as a financial counsellor with the Financial Counselling Association of NSW (FCAN).
14. Act consistently with the Centre's values and Code of Ethics and comply with the all applicable policies and procedures.
15. Liaise with other Centre staff to ensure that the issues affecting people accessing the financial counselling service are included in the policy work of the Centre.
16. Maintain, update and further develop the referral and other resources of the financial counselling service.
17. Participate in and contribute to appropriate casework, supervision, staff and management meetings.

18. Participate in and contribute to Financial Counsellors Association of NSW (FCAN) and other sector meetings as required.
19. Participate in and contribute to internal or external training or professional development opportunities as required.
20. Contribute to continuous improvement strategies in relation to the policies, procedures and work practise of the Centre.
21. Other duties as required.

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