

## JOB DESCRIPTION & PERSON SPECIFICATION

<b>Job Title:</b>	Money Management Officer
<b>Reporting to (Job Title):</b>	Appointeeship Coordinator
<b>Grade:</b>	£11,083.80 per annum (£27,340.04 FTE - Grade 5)
<b>Hours of Work:</b>	15 Hours per week (Monday to Friday)
<b>Place of Work:</b>	Waterside House, Irthlingborough – Clients could be anywhere in Northamptonshire
<b>Purpose of Role:</b>	<p>To assist the Money Management Team provide a high quality Money Management and Support service to help older people manage their finances effectively. The role will involve visiting clients to assist them with management of personal finances.</p> <p>The role will also involve working with vulnerable people and older people with varying mental capacity.</p>
<b>Main Tasks:</b>	<ol style="list-style-type: none"> <li>1. To visit clients in their own home and build relationships, confidence and trust.</li> <li>2. To liaise with family members or friends of vulnerable clients to establish that there is no other support available to assist the client. To liaise with other professionals when required (ie. NASS, Care Agencies).</li> <li>3. To visit care homes and assist clients who do not have the requisite mental capacity to manage their property and financial affairs.</li> <li>4. To set up direct debits/standing orders and cheque payments for all household bills.</li> <li>5. To organise clients` financial paperwork and to deal with any outstanding bills by liaising with the utilities or other companies by telephone and letter or electronically.</li> <li>6. To arrange collection and delivery of cash for clients who are unable to manage this for themselves.</li> <li>7. To report any suspected financial irregularity or abuse, in the first instance, to the Appointeeship Coordinator.</li> <li>8. To help implement the processes necessary to set up an appointeeship, Lasting Power of Attorney and Court of Protection deputyship with support from the Coordinator.</li> <li>9. To identify other Age UK Northamptonshire services that may be appropriate.</li> <li>10. To ensure that all administration tasks associated with the role such as case information, database entry, statistics, form</li> </ol>

	completion, filing etc, are completed in a timely, accurate and efficient manner.  11. To promote the service internally and externally.  12. Any other duties commensurate with the position.	
The tasks and responsibilities shown above are not exhaustive and should be regarded only as a guide. The post holder will be expected to undertake any reasonable activities according to the needs of the service at the time. These will be subject to periodic review and may be amended to meet the changing needs of the service. The post holder will be expected to participate in this process, and Age UK Northamptonshire would aim to reach agreement as regards any changes.		
<b>Job Title:</b> Money Management Officer	<b>Grade:</b>	
<b>Dept.:</b> Money Management Team	<b>Date:</b>	
<b>CRITERIA</b>	<b>D/E*</b>	<b>Assessed by A/I / R **</b>
<b>Education &amp; Training</b> <ul style="list-style-type: none"> <li>• Good general education to GCSE level</li> </ul>	E	A/I
<b>Experience</b> <ul style="list-style-type: none"> <li>• Experience of working with older people</li> <li>• Experience of care work</li> </ul>	D D	A/I A/I/R
<b>Skills, Knowledge &amp; Abilities</b> <ul style="list-style-type: none"> <li>• Excellent telephone manner</li> <li>• Ability to work on own initiative</li> <li>• Literacy/numeracy/communication skills</li> <li>• Excellent interpersonal and organisation skills</li> <li>• Knowledge of Lasting Power of Attorney and Court of Protection deputyship</li> <li>• Problem solving skills</li> <li>• Ability to be an effective team member</li> </ul>	E E E E D E E	A/I/T A/I/T A/I/T A/I A/I A/I/T A/I
<b>Other</b> <ul style="list-style-type: none"> <li>• Empathy with older people</li> <li>• Flexible working hours</li> <li>• Driver with access to own car</li> </ul>	E E E	A/I/R A/I A/I
Prepared By: Jamie Christie	Date: 28.11.2023	
Authorised By:	Date:	

**AF – Application Form      I – Interview    T – A written test will form part of the interview process**