



**Pension
wise**

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Guidance Specialist Job Description/Person Specification

Job title: Pension Wise Guidance Specialist

Fixed term contract up to 31 March 2022

Reports to: Delivery Centre Manager

Salary range: As advertised

Staff responsibilities: none

Overall purpose of the role:

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.

The following are the main duties of the role:

1. Provide pension and retirement information and guidance to members of the public, in line with the defined Pension Wise Service, through a medium of different channels.
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 the individual bureau 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.

Person Specification:

Essential

1. Numerical skills to understand financial matters, so that the individual is empowered to take personal action.
2. Must have a good foundation knowledge of pensions law and practice, gained in a pensions technical role.
3. Must have a thorough understanding of a broad range of pension arrangements, both occupational and personal, gained working in a pensions technical role.
4. An understanding and appreciation of wider retirement issues.
5. Proven ability in financial capability and an understanding of the issues consumers face in trying to manage their money.
6. Strong questioning skills and the ability to get to understand key client issues whilst maintaining structure and control during the course of a client interview.
7. Ability to translate complex ideas and topics into clear, concise and engaging content that the general public are able to understand.
8. Ability to identify connecting advice issues and assess an individual's ability to take action.
9. Effective communication skills. The ability to build a rapport, communicate confidently, sensitively and professionally, using oral and written techniques (including in English and Welsh where applicable).
10. Proven ability to work on own initiative – to monitor and maintain own standards and meet qualitative and quantitative targets for service delivery using proven organisational and time management skills.
11. Proven organisational and time management skills.
12. Flexibility and willingness to work as part of a team.
13. Understanding of and commitment to the aims and principles of the LCA service.
14. A commitment to ongoing personal and professional development including continuing professional development to gain and maintain accreditation for the role.
15. Ability to speak Welsh fluently (certain Wales based roles only).

Desirable

1. APMI or CII qualifications or equivalent in related areas would be of benefit.

Requirements for role

1. Understanding of, and commitment to, the aims and principles of the Citizens Advice in which equality and diversity is embedded throughout.
2. Awareness that Citizens Advice clients are at the heart of everything we do.
3. Willingness to travel within the UK (including occasional overnights) and to work unsocial hours occasionally to meet tight timescales.
4. Proven ability to use IT packages

Important information

Successful applicants are made a conditional offer subject to:

1. HM Government Baseline Personnel Security Standard (BPSS)
2. Successful completion and passing of accreditation training and exam
3. Satisfactory references
4. Depending on role requirements: DBS checks