

F2F Guidance Specialist Job Description/Specification

Job title: Pension Wise Guidance Specialist

Reports to: Delivery Centre Manager

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 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 the individual bureau and across the local Citizens Advice (LCA) network.
7. Ensure that all work conforms to the Pension Wise quality standards.
8. Ensure that all required management information is both captured and reported on a timely basis.
9. 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. Understanding of, and commitment to, equality and the positive value of diversity.
15. A commitment to on-going personal and professional development; we may require you to undertake training within the scope of the role.
16. Knowledge of the practical implications of working within a bilingual environment (Wales only)

Desirable

1. APMI or CII qualifications or equivalent in related areas would be of benefit.
2. Willingness to travel, possibly involving overnight stays, and working outside of core hours including evening and weekend working. Own transport may be required.

Notes for Recruiters

The induction programme for guiders is set based on a new guider having a solid technical knowledge of pensions as a result of experience in a pensions technical role.

We require candidates to have a minimum of 2 years 'pensions' experience. Please be cautious when you review the experience. Someone working in a purely pensions administration role may not have the technical expertise we would want them to have even after 5 years. Someone working in a more technical role, however may have gained the experience we want over a shorter time. This is why we have not set a minimum period of experience within the job description itself.

Candidates must have a broad knowledge of all types of pensions schemes, but obviously DC is more important. We would not expect someone who has only DB experience to have enough understanding of DC schemes to be suitable for the PW Guider role.

Ideally, we would like candidates to have started a professional pensions qualification, as this shows dedication to this type of profession. Also they will be expected to study and pass a technical test during their Pension Wise induction.

If you have any concerns about the suitability of an individual's experience for the role, you should contact your regional Service Delivery Team. They will be happy to answer any questions.

In order to ensure that you are able to recruit candidates with sufficient experience please use specialist pensions recruitment agencies.

Please ensure that candidates are aware of the commitment regarding compulsory attendance at a 3 week induction programme of which approx 5-6 days are likely to involve overnight stays (probably in London)