

## **PENSION WISE**

### **Guidance Specialist - Application Briefing (Telephone and face to face)**

#### **Overall purpose :**

The Pension Wise Guidance Specialist will provide accurate and relevant information and guidance to people either over the telephone or in a face to face setting, helping them to understand their pension options & the full implications of each.

#### ***Main duties:***

1. Provide information and guidance to members of the public, in line with the Pension Wise service standards.
2. Using the skills appropriate to the role, help consumers to understand the full implications of their pension choices
3. To raise consumer awareness of pension scams and fraud and to encourage and assist consumers to report them to the relevant authorities.
4. Respond proactively and flexibly to consumer demand, working to agreed service delivery standards.
5. Provide timely and accurate follow up information that is clear and understandable.
6. Contribute towards shared best practice within their organisation and across the Citizens Advice 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 any 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. Good foundation knowledge of pensions products, law, practice and products, gained in a pensions technical role.
2. Numerical skills to understand and translate complex financial matters
3. An understanding and appreciation of wider retirement issues.
4. Proven ability in financial capability and an understanding of the issues consumers face in trying to manage their money.
5. Ability to translate complex ideas and topics into clear, concise and engaging content that consumers are able to understand.
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 appropriate oral and written techniques.
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. Flexibility and willingness to work as part of a team
12. Understanding of and commitment to the aims and principles of the Citizens Advice service.
13. A commitment to on-going personal and professional development; you will be required to undertake training within the scope of the role.

***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.