

**MONEY COACH ROLE DESCRIPTION**

**Purpose of the role**

Financial capability work gives people a basic financial education to help them make better budgeting, borrowing, saving and banking decisions. It aims to encourage people to manage their finances more effectively and help people take control before they reach crisis point.

The volunteer financial capability one-to-one trainer role is to develop and deliver financial education to individuals.

**Main duties and responsibilities may include:**

* Delivering financial capability sessions in an interesting and engaging manner; covering debt prevention, money management skills such as budgeting, using bank accounts, options for borrowing and saving, and dealing with debt.
* Ensuring feedback is received from clients. Review, revise and improve sessions and materials in the light of feedback.
* Making accurate records of education sessions and clients seen, using bureau case recording systems and other monitoring systems required by funders.
* Planning financial capability sessions appropriate to the needs of the individual client, and working with them to develop action plans.
* Identifying research and campaigns issues arising from work with clients.
* Making referrals for advice appointments where appropriate.
* Keeping up to date with developments in financial capability, including attending appropriate training.
* Attending bureau meetings and financial capability regional forums, and other national events where appropriate.

**Personal skills and qualities that a financial capability one-to-one trainer needs:**

* Understanding of, and commitment to, the aims and principles of the CAB service and its equality and diversity policies.
* Excellent communication skills.
* Understanding the basics of coaching and motivating individuals.
* Understanding the basics of money management, and of the skills and confidence required to manage money effectively.
* Understanding the difference between financial capability training and debt advice.
* Friendly and approachable.
* Able to work as part of a team.
* Respect for views, values and cultures that are different to their own, and an empathy with clients.
* Understanding why confidentiality is important.
* A positive attitude to self-development and assessment.