



T H E  
F R I E N D L Y  
T R U S T

## Job Description Trust Officer

**Salary:** current annual salary scale

**Responsible to:** The Coordinator

### **Main purpose of Post**

The post holder will give advice and support to vulnerable people, their families and carers on the current and future management of their finances.

She or he will be responsible for a case load of service users who need support to manage their financial affairs.

He or she will assist the Coordinator and the Management Committee in the fulfilment of The Friendly Trust's aims and objectives and will undertake such duties as may be reasonably requested from time to time by the Coordinator to whom she or he shall be accountable.

### **Duties**

The post holder will be required to:

- Work within the Friendly Trust's framework of aims and values.
- Develop awareness of current issues and debates in the management of the financial affairs of vulnerable people and develop a sound knowledge of welfare benefits, of relevant legislation and of institutions which can affect the finances of vulnerable people.
- Meet with and visit families and service users as appropriate in each case for which they are responsible, giving advice on welfare benefits, wills & trusts and any other financial matters which affects the vulnerable person or their carer.
- On a rota basis, take general responsibility for taking calls and seeing visitors and service users who call at the office at "open" times (office duty).
- Keep accurate and up to date case notes in line with the current Friendly Trust procedures.
- Act as "appointee" to receive welfare benefits on behalf of service users.
- Maintain service user accounts using a computer, monitoring incomes and expenditures to ensure that all entitlements are received and managed well.
- Support the Coordinator in the maintenance of Friendly Trust's statistical information.
- Participate in the updating of the Friendly Trust's record of policies and procedures when appropriate.
- Represent the Friendly Trust to external agencies, at conferences and other public meetings.
- Attend and contribute to Management Committee meetings when required by the committee or the Coordinator.
- Any other duties as may reasonably be from time to time required by the Coordinator.