



## **Role Profile**

**Client Finance Officer - Grade 05**  
**Team: Client Financial Services**  
**Service: Financial Management supporting Adults**  
**Directorate: Corporate Services**

### **Key Role Descriptors:**

The role holder will work as part of the Client Financial Services team and contribute to the provision of a high quality service for all appointee and deputy customers.

The role holder is responsible for the accurate and timely management and safeguarding of personal finances for vulnerable adults who lack mental capacity.

The role holder will oversee a caseload of customers, with reference to their personal finances, welfare benefit entitlements, savings, investments, debts and expenditure needs, but also having an understanding of their social care and safeguarding needs.

The work is undertaken in accordance with key guidelines, policies and legislation from the Department for Works and Pensions (DWP), the Court of Protection (COP), the Office of the Public Guardian and the Mental Capacity Act.

### **Key Role Accountabilities:**

Respond to queries from a wide range of both internal and external stakeholders, in an efficient and courteous manner, using sound judgement, initiative and creative skills to resolve problems.

Provide information and advice about Client Financial Services.

Ensure protection and confidentiality of customer information.

Responsible for managing and prioritising a demanding caseload of appointeeships and deputyships, including:

- Accurately maintain, analyse and monitor financial and administrative records
- Investigate and challenge on behalf of the customer, where appropriate
- Maximise welfare benefit entitlement
- Monitor and control customers' income and expenditure
- Monitor assets, investments and debts
- Making relevant applications for new cases to the DWP and COP
- Complete processes ensuring high standards of accuracy and deadlines are met.

Personal commitment to continuous self development and service improvement.

Willingness to work flexibly within operational requirements, travel to various locations

Through personal example, open commitment and clear action, ensure diversity is positively valued, resulting in equal access and treatment in employment, service delivery and communications.

Where the roleholder is disabled every effort will be made to supply all necessary aids, adaptations or equipment to allow them to carry out all the duties of the role. If,



however, a certain task proves to be unachievable, job redesign will be given full consideration.

### Key Competencies and Technical Requirements

#### Our Manchester Behaviours

- **We are proud and passionate about Manchester**
- **We take time to listen and understand**
- **We 'own it' and we're not afraid to try new things**
- **We work together and trust each other**
- **We show that we value our differences and treat people fairly**

#### Generic Skills

- **Interpersonal Skills:** Demonstrates an understanding of the views of others and communicates in a realistic and practical manner using appropriate language and listens attentively to views and issues of others.
- **Planning and Organising:** Demonstrate the ability to organise and prioritise multiple tasks in the most effective way, and allocate time according to task complexity and priority. Ability to work under pressure to meet targets and deadlines.
- **Problem Solving and Decision Making:** Ability to interpret rules and guidelines and is able to make effective decisions on a day-to-day basis, taking ownership of decisions, demonstrating sound judgement in escalating issues where necessary.
- **IT Skills:** Ability to use multiple applications, systems and associated software packages.
- **Administrative:** Ability to use and accurately maintain effective administration systems in a rapidly changing environment. Good literacy and excellent numeracy skills.
- **Teamwork:** A commitment and ability to work with colleagues and managers across boundaries to deliver service excellence and improvement.

#### Technical requirements (Role Specific)

Good basic knowledge and understanding of financial processes.  
Good basic knowledge and understanding of Adult Social Care.  
Detailed knowledge of the Welfare Benefits system and benefit entitlements.