

# Financial Services Specialist

<b>Job Title:</b>	Financial Services Specialist
<b>Reporting to:</b>	Financial Services Manager
<b>Location:</b>	Home-based
<b>Salary:</b>	£28k
<b>Contract:</b>	Full-time (35 hrs per week) / 12 Month Contract, subject to extension

## Key responsibilities

### Supporting Best Practice

- Provide consultancy and advice to financial services in development of the firm's models on economic abuse, including through secondments, and contributions to specific projects and initiatives to ensure fair outcomes are reached for victim-survivors.
- Support firms to best utilise their own data and resources and the latest evidence and cutting-edge policy and practice across domestic abuse and financial services through providing high-quality advice, problem-solving and ad hoc support.
- Provide specialist guidance to the financial services firms as they implement the Consumer Duty and work with firms to ensure their products and procedures do not inadvertently facilitate economic abuse and they are providing support to survivors in line with regulatory guidance and best practice.
- Hold a portfolio of relationships with stakeholders within financial services and regularly liaise with them to encourage innovative collaboration with SEA.
- Support financial services firms with the implementation of the Economic Abuse Evidence Form and provide tailored guidance and support on individual cases.

### Training delivery

- Coordinate training opportunities and meet with firms to discuss their specific needs and requirements.
- Design bespoke training proposals alongside the Impact and Partnerships team.

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## Surviving Economic Abuse

- Ensure training is kept up to date with the latest research and data, as well as EEG lived experience.
- Deliver training so that partners within financial services can identify, understand, and support customers experiencing economic abuse.
- Be responsible for post-training follow-up correspondence and any opportunities to influence best practice that may arise.

### **Resource development**

- Support the Advocacy & Comms team in the ongoing development of a range of resources for financial services to support their interactions with customers; and for survivors to guide their interactions with banks and building societies.
- Actively seek opportunities to influence best practice and good outcomes for survivors.

### **Influencing industry policy**

- Work with the Financial Services Manager to develop briefing papers and best practice guides.
- Work with the Financial Services Manager to develop an industry stakeholder map to support influencing work across the financial services sector.
- Support the work of the Advocacy & Comms team in influencing national policy on economic abuse when required.

### **General duties**

- Support the wider specialist team with responding to emails received from victim-survivors and signpost victim-survivors in contact with SEA in relation to banking needs.
- Create and design content for SEA's monthly financial services newsletter and share with the mailing list with an aim to increase recipients.
- Take on additional tasks from the Financial Services manager and Head of Specialist Team and Survivor Engagement as required
- Contribute to the promotion of SEA and its work. Be a champion who seeks to encourage and motivate financial services firms to adapt strategies and policies which adequately respond to economic abuse
- Utilise Salesforce Customer Relationship Management (CRM) system (training will be provided) to record all activity with financial service's firms contacts accurately and keeping information up to date
- Participate and contribute to team meetings and organisational development.
- Engage in learning, stay up to date on relevant news and publications and take responsibility for your own personal development; and
- comply with SEA's policies and procedures and legal requirements, such as provisions set out in the GDPR, Health and Safety at Work Act 1974 and Equality Act 2010.

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### **Surviving Economic Abuse**

Surviving Economic Abuse (SEA) is the only UK charity dedicated to addressing economic abuse - a form of domestic abuse.

## Person specification

### Essential skills

- A commitment to the values and feminist ethos of SEA.
- An excellent understanding of the banking sector and the customer vulnerability agenda
- Strong interpersonal skills: experience of developing effective working relationships with a range of stakeholders including corporate organisations.
- Excellent communication skills – oral and written – with attention to detail.
- Strong organisational, multi-tasking and administrative skills; able to meet tight deadlines.
- Able to work independently, within a dispersed team and flexibly.
- Strong IT skills including Word, Excel, data management and the use of virtual meeting software.

### Essential Experience

- Strong track record of working with financial services/supporting vulnerable customers and/ or experience of working within the domestic abuse sector.
- Providing advice and support related to complex issues, such as safeguarding.
- Designing and delivery of training and presentations to large audiences.
- Leading on projects and initiatives to improve responses and/or outcomes for vulnerable customers.

### Desirable

- A strong understanding of economic abuse, the ability to consider financial services and products through the lens of economic abuse.

## Additional specification

This role is home-based. A laptop and telephone are provided, and travel expenses are covered. The wider SEA team meets approximately once a month, virtually and travel will be expected once a quarter for in person meetings at various locations across the country. Due to the nature of our work and this role, appointment will be subject to satisfactory Disclosure and Barring Service (DBS) check and references.

Surviving Economic Abuse (SEA) is committed to promoting a diverse and inclusive team which reflects the diversity of the communities we support. Our culture celebrates diverse voices and we particularly encourage applications from individuals from communities that are under-represented.

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