



THE
FRIENDLY
TRUST

Job Title: Trust Officer

Salary: £30,108 rising to £33,453 increasing incrementally on your work anniversary

Reports to: Team Manager

Location: Cardiff with hybrid working options (subject to successful completion of probation)

About The Friendly Trust

The Friendly Trust is a Wales-based registered charity providing specialist information, advice, and financial administration for disabled people and other vulnerable adults, and for families planning for the future of someone who lacks capacity. We work to uphold rights, promote independence, and ensure that people are supported to live the lives they choose.

Purpose of the Role

The Trust Officer plays a key frontline role in delivering high-quality advice, financial administration, and ongoing casework support to Service Users and their families. The postholder will manage an allocated caseload, ensuring that service users' property, financial affairs, and welfare benefits are administered lawfully, accurately, and in their best interests, in line with relevant legislation and The Friendly Trust's values and procedures.

Key Responsibilities

Client Support and Casework

- Provide clear, accessible advice and ongoing support to Service Users, carers, and family members on welfare benefits, financial management, wills, trusts, and related matters.
- Build and maintain positive, professional relationships with Service Users, acting in a person-centred, strengths-based, and rights-focused way.
- Meet with and visit Service Users and families as required, including home visits and meetings with external professionals.

Financial Administration and Appointeeship

- Act as Department for Work and Pensions (DWP) Corporate appointee where required, ensuring the correct receipt and use of benefits in the best interests of Service Users.
- Manage Service Users' day-to-day finances where required, including budgeting, monitoring income and expenditure.
- Create, implement, and regularly review individual money plans, adjusting them in response to changing needs and circumstances.

Record Keeping and Compliance

- Maintain accurate, up-to-date, and timely case records in line with organisational procedures, legal requirements, and UK GDPR.
- Use case management and financial recording systems (CasparGov) to document actions, decisions, and outcomes.
- Ensure all work reflects current legislation including the Mental Capacity Act 2005, Court of Protection guidance, and safeguarding standards.

Communication and Team Working

- Draft clear and professional written communications, including letters, emails, records, and reports.
- Participate in an office duty rota, responding to telephone and face-to-face enquiries during designated times.
- Work collaboratively with colleagues, providing cover for absent team members when required.

Organisational Contribution

- Represent The Friendly Trust professionally when liaising with external agencies, attending meetings, conferences, and events as required.
- Participate in training, supervision, and continuous professional development.
- Contribute to the review and development of policies, procedures, and service improvements.
- Support the organisation's commitment to equality, diversity, safeguarding, and environmental sustainability.
- Undertake any other duties reasonably required by the line manager consistent with the role.

Person Specification

Essential

- Minimum of 3 years' experience in social care, social work, advocacy, or a related field (including volunteering or unpaid caring roles).
- Experience of working with disabled people, people with learning disabilities, carers, or people with mental health needs
- Sound knowledge of welfare benefits and relevant legislation, including the Mental Capacity Act 2005.
- Excellent interpersonal, verbal, and written communication skills.
- Demonstrated empathy and ability to work sensitively with vulnerable people and families.
- Experience of financial administration, budgeting, recording, and monitoring expenditure.
- Competent IT skills, including Microsoft Office and case management systems.
- Level 2 (or equivalent) qualification in literacy and numeracy.
- Ability to manage a varied caseload with good organisation and time-management skills.
- Full driving licence and access to a car.

Desirable

- Relevant qualification in social work, health, social care, or a related discipline.
- Experience in an advocacy or rights-based role.
- Knowledge of Court of Protection Deputyship process
- Knowledge of CasparGov or similar financial/case management software.
- Experience of working with multiple agencies and professionals across sectors.

What We Offer

- A supportive, values-driven working environment.
- Opportunities for training and professional development.
- Flexible and hybrid working options (subject to service needs and probation).
- Generous leave entitlement and employee wellbeing support.

Application Process

The Friendly Trust is committed to fair, transparent, and safer recruitment practices. Our recruitment and selection process will be carried out in line with our Recruitment Policy and relevant employment and safeguarding legislation.

How to apply

- Applicants are asked to submit a CV and a supporting statement to recruitment@friendlytrust.org.uk explaining how they meet the Person Specification for the role by the midday on the 5th June 2026
- Applicants should provide a full employment history, including any gaps in employment.

Shortlisting

- Shortlisting will be carried out by a recruitment panel using the essential and desirable criteria set out in the Person Specification.
- Shortlisting decisions will be made objectively and without regard to protected characteristics, in line with equality and diversity legislation.

Interviews and assessment

- Shortlisted candidates will be invited to interview by email.
- Interviews will take place the week commencing 15th June 2026
- Interviews will be conducted by a panel of at least two people, which may include senior staff and/or Trustees.
- The selection process may include additional assessment methods, such as a practical exercise or short presentation, relevant to the role.
- Notes will be taken by panel members to support fair and consistent decision-making.

Appointment and pre-employment checks

- All offers of employment are subject to the receipt of satisfactory references. Two references will be requested, one of which should be from a current or most recent employer.
- The successful candidate will be subject to an Enhanced Disclosure and Barring Service (DBS) check, due to the nature of the role and contact with vulnerable adults.
- Having a criminal record will not automatically prevent appointment. Any disclosures will be considered fairly, confidentially, and proportionately, in line with the Rehabilitation of Offenders Act 1974 and the DBS Code of Practice.

Equality, safeguarding and safer recruitment

- The Friendly Trust is committed to equality of opportunity and actively welcomes applications from people of all backgrounds.
- Appropriate safeguarding considerations will be applied throughout the recruitment process, reflecting our responsibility to protect vulnerable people.
- Information provided as part of the recruitment process will be handled in accordance with UK GDPR and confidentiality requirements.

Equal Opportunities Monitoring

- Applicants will be invited to complete an Equal Opportunities Monitoring Form. This information is collected for monitoring purposes only, is entirely voluntary, and is not shared with the shortlisting or interview panel.
- Monitoring data is used to help the organisation review and improve the fairness and inclusivity of its recruitment practices, in line with equality legislation.

Contact Information

To apply, or for any questions regarding the position, please contact recruitment@friendlytrust.org.uk