



Finance Officer

Job pack

Thank you for your interest in working at Citizens Advice Bristol. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice nationally and in Bristol
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, please contact:
Sarah Telford, sarah.telford@citizensadvicebristol.org.uk

How to apply

Please [read our Guidance notes for applicants](#) before filling in your application. Once you are ready to apply please fill in the web application form on the website.

Closing date for applications **5pm 23rd October 2026**

Key aspects of the role

- **Salary:** £38,000 (pro rata)
- **Hours:** 21 hours per week
- **Contract:** Permanent
- **Location:** Bristol Head Office, 48 Fairfax Street Bristol BS1 3BL
- **Reporting to:** Chief Executive Officer

Thank you for your interest in joining Citizens Advice Bristol.

Every day we help people find a way forward, whether they are facing problems with debt, housing, employment, benefits, family issues or consumer rights. Behind every piece of advice we give is a team of people who make sure the organisation runs effectively.

We're looking for someone who takes pride in keeping things organised, accurate and running smoothly. Your work will provide the financial foundations that allow our team to focus on helping people across Bristol.

About Citizens Advice Bristol

Citizens Advice Bristol provides free, confidential, independent and impartial advice to anyone who needs it.

We believe everyone deserves access to high quality advice and information, regardless of their circumstances. Alongside supporting individual clients, we use our insight to influence change and improve policies that affect people's lives.

Our values

We're inventive. We're not afraid of trying new things and we learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

3 things you should know about us

1. We're local and we're national. We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.

2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

How Citizens Advice Bristol works

We are an independent local charity that provides free impartial confidential advice, information and support to anyone in Bristol and we provide access to justice for all. We are a member of National Citizens Advice. We dealt with over 29,000 issues in the 2025/26 financial year.

We provide free confidential advice online, over the phone and in-person. We give people the knowledge and confidence they need to find their way forward, whoever they are, whatever their problem. Our services range from information through to fully supported casework.

We cover all subject areas with a focus on welfare rights, debt, housing and employment and immigration. We deliver targeted services to particularly

disadvantaged groups and in the most deprived areas. We use evidence from our clients to raise awareness about the issues that adversely affect people's lives. To find out more about us:

- Take a [look at our about us information on our website](#)
- Take a look at the [national Citizens Advice](#) website and the Citizens Advice [Campaigning site](#).

We deliver advice and support to thousands of people every year. We do this by providing the following services, delivered between volunteers and paid staff.



Adviceline – freephone telephone advice service providing first response.



In-person Advice – face-to-face advice delivered at a variety of locations



Email advice – ensures that people who cannot call or visit receive the same quality of advice.



Outreach Services- we deliver from various locations in the city, including Foodbanks, Southmead Hospital, Welcoming Spaces and Bristol ReStart.



Equality, Diversity and Inclusion – We apply core values of dignity, respect, equality and non-discrimination, based on our common humanity. We seek to foster empowerment and participation at all levels.



Research & Campaign work – we collect evidence of the issues facing our clients and groups within the community, and we use this evidence to challenge unfairness and influence decision makers at local, regional and national level.



Dedicated Projects - As well as our open access service, which anyone can access about any issue, we also work in partnership with local and national partners to deliver a number of additional specialist funded services. These are primarily delivered by paid staff, and are listed below:

East Bristol and North Bristol Foodbanks: support to people who need foodbank help including budgeting, debt, and exploring other charitable support.

Macmillan Benefits Advice Service: provides benefit advice and Macmillan grant applications to people affected by cancer.

Multiple Sclerosis Access-to-Advice: provides advice and information on any subject to those affected by MS.

Money and Pension Service (MaPS) funded debt advice: providing holistic debt advice and income maximisation.

Cost of Living project: delivered in the city's Welcoming Spaces, this service provides information to those affected by the cost of living crisis.

Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

This role sits our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.



The role

The role you're applying for is **Finance Officer**

Location: 48 Fairfax Street, Bristol BS1 3BL

Reporting to: Chief Executive Officer

About the role

The Finance Officer is responsible for the day to day operation of our finance function. Working closely with the Chief Executive, Managers and our external accountants, you will ensure that financial records are accurate, payments are processed on time and financial information is reliable.

This is a varied role that combines practical bookkeeping, financial administration and continuous improvement. We are looking for someone who enjoys creating order, improving processes and making sure nothing slips through the gaps.

You do not need to be a qualified accountant, but you will have strong bookkeeping and finance administration experience together with excellent organisational skills.



Role profile

Key responsibilities	
Financial administration	Maintain accurate financial records using the organisation's accounting system (Quickbooks).
	Process purchase invoices, sales invoices and credit notes.
	Prepare supplier payment runs.
	Record grant income, donations and other receipts.
	Maintain the purchase and sales ledgers.
	Monitor cash flow and bank balances.
Banking and reconciliations	Complete monthly bank reconciliations.
	Investigate and resolve discrepancies promptly.
	Maintain petty cash records where required.
	Reconcile balance sheet accounts.
Payroll and pensions	Prepare monthly payroll information for our payroll provider.
	Process staff expenses.
	Maintain pension records.
	Ensure payroll information is accurate and submitted on time.
Financial reporting	Produce monthly management information.
	Assist budget holders with financial information.

	Support the preparation of annual budgets.
	Prepare schedules and working papers for the annual audit.
Charity finance	Maintain records in accordance with charity accounting requirements.
	Support Gift Aid claims.
	Ensure financial records comply with internal controls and external requirements.
	Maintain accurate audit trails and documentation.
Data protection and confidentiality	Handle financial, payroll and other sensitive information in accordance with Citizens Advice Bristol's data protection policies and applicable data protection legislation.
	Maintain confidentiality at all times and ensure information is stored and shared securely.
	Promptly report any actual or suspected data breach or confidentiality concern through the CEO.
Continuous improvement	Review finance processes and identify opportunities for improvement.
	Produce simple procedures and guidance.
	Support colleagues with finance related queries.
	Help develop an efficient, well organised finance function.

Person specification

What we're looking for

We are looking for someone who enjoys working with detail, takes ownership of their work and understands the importance of reliable financial information.

You will be someone who notices when something doesn't look right and is motivated to put it right.

Essential	
Experience	Experience working in a finance, bookkeeping or accounts administration role.
	Experience processing invoices and supplier payments.
	Experience completing bank reconciliations. Experience supporting month end processes.
	Experience using accounting software such as QuickBooks.
Knowledge	Double entry bookkeeping.
	Good understanding of financial controls.
	Excellent Excel and Microsoft Office skills.
	Demonstrable understanding of confidentiality and data protection when handling sensitive financial and personal information.
Skills	Excellent attention to detail.
	Strong organisational skills.
	Able to manage competing priorities.
	Able to communicate effectively with colleagues who do not have a finance background.

	Able to work independently and use initiative.
	Strong problem solving skills.
Personal qualities	Reliable and dependable.
	Calm and methodical.
	Positive and approachable.
	Committed to continuous improvement.
	Shares the values of Citizens Advice and our commitment to equality, diversity and inclusion.
Desirable	AAT qualification or working towards one.
	Experience working within a charity.
	Knowledge of charity accounting.
	Experience preparing audit files.
	Experience supporting payroll.
	Experience with grant income and restricted funds.

Why this role matters

Our advisers cannot support thousands of local people each year without strong operational support behind the scenes.

Your work will ensure suppliers are paid, staff are paid correctly, budgets are monitored and financial records are accurate. In doing so, you'll help ensure Citizens Advice Bristol can continue providing free, independent advice to those who need it most.



What we give our staff

We provide a range of colleague benefits from flexible working to wellbeing support and prioritising learning and development.

You can [read all our colleagues' benefits in this google document.](#)

1. ANNUAL/TOTAL LEAVE

Employees are entitled to 5 weeks' paid annual leave in each leave year (rising to 5.6 weeks with length of service) plus statutory holidays, pro-rata for part-time staff. In addition you will normally also get the working days between Christmas and New Year (usually 3 days).

2. PENSION SCHEME

Citizens Advice Bristol provides an employee pension scheme with a 5% employer contribution. Further details of this scheme will be provided to the successful applicant at offer.

3. DISCLOSURE AND BARRING SERVICE CHECKS (DBS)

Some Citizens Advice positions may require the successful candidate to undergo a DBS check. However, a criminal record will not necessarily be a bar to your being able to take up the job.

4. EQUALITY AND DIVERSITY

Citizens Advice Bristol recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We are fully committed to stand up and speak up for those who face inequality and disadvantage.

It's important to us that our team reflects the rich diversity of the communities that we serve. We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable. Citizens Advice will not discriminate or tolerate discriminatory behaviour on the grounds of: age; sex; gender reassignment; marriage or civil

partnership; pregnancy or maternity leave; disability; race including colour, nationality, ethnic or national origin; religion or belief; sexual orientation; educational background; employment status; working pattern; trade union membership; or any other irrelevant factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other. All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles. Breaches of the policy may lead to disciplinary action.

5. DIGNITY AT WORK

Citizens Advice Bristol is committed to providing a culture in which all staff value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

6. PROBATIONARY POLICY

New appointments are subject to a six month probationary period. At the end of the probationary period the outcome of the assessment may be confirmation of post; notice of dismissal; or at Citizens Advice Bristol's discretion, an extension of the probationary period.

7. POLITICAL IMPARTIALITY

An important part of the principle of impartiality is that Citizens Advice Bristol staff are seen to be upholding the principle of party political impartiality. To avoid possible misunderstanding or possible conflicts of interest guidelines have been established on staff taking part in party political activities. If you currently

hold, or are intending to stand for local or national party political office, we will expect you to tell us about this if shortlisted for interview.

8.FLEXIBILITY

Our roles are open to discussion about flexible working.