

	Last Updated: 19/02/2026		
Job Title	Student Money Advisor		
Faculty/ Department	Chief Student Officer's Directorate	Legal Entity	University of Surrey
Job Family	Professional Services	Job Level	3
Reports To	Student Money Advice Manager	Line Manages (role title(s))	N/A

Job Statement

The Student Money Advisor contributes to providing excellent student support services, aiding the recruitment, retention and progression of all students, and ensuring very high levels of student satisfaction.

The post-holder provides support and advice to Surrey students (both UK and International – UG, PG and PGR), throughout their student lifecycle. Areas of responsibility include offering information, advice and guidance around different areas of advice/student life with a specific focus on money support.

Key Responsibilities This is not designed to be a list of all tasks undertaken but the main responsibilities (5 to 8 maximum)

1. Provide a professional and specialist advice service to students and applicants on their eligibility on a range of subjects including student financial support, discretionary support funds, money management, and signpost to specialist support for benefits, tax, and debt, as needed.
2. Represent the University to relevant internal/external groups, as a member of relevant professional organisations.
3. Advise students about the financial implications that may occur of interrupting their study, repeat study, course transfers or withdrawals.
4. Regularly record student contact and case work on relevant databases such as SITS and Dynamics.
5. Participate in recruitment and enrolment related events (open days) and assist with other activities which underpin the student lifecycle as required.
6. Devise and deliver presentations and workshops for both current and potential students in areas relating to Student Money Advice, and support creation of Student Money Advice resources for other support services, as required.
7. Undertake such other duties across support services, given the level of the role, as may be requested by the Student Money Advice Manager or Head of Student Hub.
8. Work in close collaboration with other services within the Student Experience Department to enhance the student experience for both prospective and current students.

N.B. The above list is not exhaustive.

Role Scope and Impact This is a summary of the post holder's role in delivering outcomes, making decisions, and the complexity of problem-solving involved in the role.

Student Money Advisors work as part of the Student Experience Department to enhance the student experience at Surrey and to ensure that students receive excellent support and advice. Support is available to every student, and the team is responsible for the assessment and administration of the University Hardship Funds, as well as discretionary Government funding in relation to Hardship, when allocated.

The post holder will work within the Student Money Advice Team to deliver student-centred advice and guidance to both students and staff on a range of financial, and funding issues.

The post holder will keep up to date with relevant policies and regulations regarding statutory and discretionary student support and other sources of finance and funding, to ensure effective advice and support for students and staff, timely casework administration and contribution to improved process/procedures.

The post holder will communicate with prospective and current students by telephone, via the student portal in person and online, providing efficient and effective help to students. This will include working autonomously at times without close line management supervision, but within the limitations of their training, and with general support from the whole team, and wider Student Experience department.

The post holder is responsible for the resolution of routine financial problems with individual students and liaising with relevant University staff and external bodies. The post holder will be expected to identify the nature

of any problems and issues through analysis and then apply their judgement and initiative in order to find an appropriate resolution.

The post holder will carry out student money related casework, working in a proactive manner to resolve student queries, referring to colleagues and appropriate advice services where necessary, to achieve an effective and supportive end result. They will organise their own individual tasks and follow manager requests in order to meet agreed deadlines as appropriate.

Person Specification This section describes the knowledge, experience & competence required by the post holder that is necessary for standard acceptable performance in carrying out this role.

Qualifications and Professional Memberships		
Broad vocational experience, acquired through a combination of job-related vocational training and considerable on-the-job experience, demonstrating development through involvement in a series of progressively more demanding relevant work/roles.		E
Evidence of training and continuous professional development from a recognised advice sector provider e.g. NASMA, AdviceUK.		D
Technical Competencies (Experience and Knowledge) Level 1: basic level of understanding/experience and can apply it with guidance. Level 2: good level of understanding/experience and can apply it with little or no guidance. Level 3: expert level of understanding/experience and can apply, develop it and guide others.	Essential/ Desirable	Level 1-3
Experience of providing information, advice and guidance within a higher education, or charity / public sector setting (e.g. student fees/funding/debt/financial capability)	E	2
Experience of supporting individuals with complex regulatory procedures	E	2
Experience of discretionary fund decision making and identification of current issues.	E	2
Competent degree of IT capability, including experience of using Microsoft Word, excel, power point and outlook email or similar packages	E	3
Excellent communication and presentation skills, and the ability to convey complex information with clarity to a range of audiences	E	2
Excellent advisory skills and the ability to interpret and advise on complex statutory regulations and procedures	E	2
Excellent collaboration and organisational skills, including the ability to engage in self-directed learning.	E	2
Experience of dealing with cultural sensitivity issues requiring tact, diplomacy and a calm approach in difficult situations	E	2
Special Requirements This may include a Disclosure and Barring Service (DBS) check, regular overseas travel, driving licence, shift work.		Essential/ Desirable
Ability to work outside contracted hours at Open Days & attend training/conferences as required.		E
The post-holder will be expected to contribute to Welcome events in late September and annual leave should not be taken between mid-September and mid-October.		E
Core Competencies This section contains the level of competency required to carry out this role. (Please refer to the competency framework for clarification where needed). n/a (not applicable) should be placed, where the competency is not a requirement of the grade.		Level 1-3
Communication		3
Adaptability and Flexibility		2
Customer, Client service and support		3
Planning and Organising		2

Continuous Improvement	2
Problem Solving and Decision Making Skills	2
Managing and Developing Performance	1
Creative and Analytical Thinking	1
Influencing, Persuasion and Negotiation Skills	2
Strategic Thinking and Leadership	1

This Job Purpose outlines the core activities of the role. As the Department and the post holder evolve, the duties and focus of the role may change. The University expects the post holder to adopt a flexible approach to work, including undertaking relevant training when necessary. If significant changes to the Job Purpose are required, the post holder will be consulted, and the changes will be reflected in a revised Job Purpose.

All staff are expected to:

- Positively support equality of opportunity and equity of treatment to colleagues and students in accordance with the University of Surrey Equal Opportunities Policy.
- Work to achieve the aims of our Environmental Policy and promote awareness to colleagues and students.
- Follow University/departmental policies and working practices in ensuring that no breaches of information security result from their actions.
- Contribute towards broader university initiatives that have a positive impact on student experience, recruitment and campus operations. This may include participation in cross-functional activities such as open days, confirmation and clearing, welcome week, graduation.
- Ensure they are aware of and abide by all relevant University Regulations and Policies relevant to the role.
- Undertake such other duties within the scope of the post as may be requested by your Manager.
- Work supportively with colleagues, operating in a collegiate manner at all times.

Help maintain a safe working environment by:

- All staff have a statutory responsibility to take reasonable care of themselves and others and to prevent harm by their acts or omissions. All staff are, therefore, required to adhere to the University's Our Safety Policy Statement and associated Procedures.

Organisational/Departmental Information & Key Relationships

Background Information

The post holder will be based in the Student Experience Department which includes approximately 40 staff across a range of support teams which work together to promote an optimal student experience.

The role will involve liaison with various internal and external contacts:

Internal: They will work closely with the Student Money Advice Manager and other student advisors. The post-holder will also work with other stakeholders within the University including the MySurrey Hive Assistants, MySurrey Hive Case Co-ordinators, Student Wellbeing teams, Students' Union, Employability team, and Disability and Neuroinclusion. We also support initiatives from our Student Success and EDI team and Widening Participation department.

External: All necessary networks for general welfare and advice, such as the National Association of Student Money Advisors, the Student Loan Company, The NHS Business Services Authority, The Citizens Advice Beueau, Blackbullion, and any other relevant parties.

Department Structure Chart

