



## **Dosh Financial Assistant**

### **Application Pack**

Grantham, Lincolnshire

**Deadline: 26<sup>th</sup> June 2026**



22.05.2026

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Dosh is a company limited by guarantee, no. 6337548

Dosh Ltd is part of the Thera Group of companies.  
Registered Office – 134 Edmund Street, Birmingham, B3 2ES

# Welcome Letter

Dear Applicant,

Thank you for your interest in the position of Financial Assistant.

This application pack includes the following documents about Dosh and further information about the position of Financial Assistant:

- About Dosh and the Dosh Promise
- Thera Group Structure and Vision
- The role in a nutshell: Financial Assistant
- Job Description
- Person Specification
- Competencies
- Pay and Benefits

In addition, you can find further details about Dosh at [www.dosh.org](http://www.dosh.org) and about the Thera Group at [www.thera.co.uk](http://www.thera.co.uk).

**We value diversity in our team and promote equality and inclusion across Dosh. We welcome applications from people of all backgrounds who have a commitment to our values and are keen to learn, grow and contribute to our mission at Dosh.**

If you have any questions regarding Dosh, then please email [Angela.Atkin@dosh.org](mailto:Angela.Atkin@dosh.org)

Kind regards,

**Angela Atkin**

Financial Advocacy Manager

## About Dosh



money

Dosh is a not for profit company that supports people with a learning disability to have more control and more independence over their money.



specialist

Dosh is a specialist company within the Thera Group and provides support to people with a learning disability in England, Scotland and Wales. The company was set up in 2007.



support

People with a learning disability can receive support in a number of ways:

- Financial advocacy
- Person-centred appointeeship
- Account management for self-directed support
- Money checks



appointee



local area

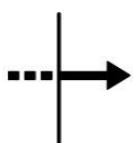
Dosh Financial Advocates are based locally so that people can receive support when they need it.



benefits

Dosh Financial Advocates are able to support people in many ways, including support to create a budget, manage bill payments and banking, apply for and manage benefits.

### Our values are:



persistence



trust



team



can



person centred



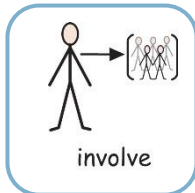
independence

# The Dosh Promise

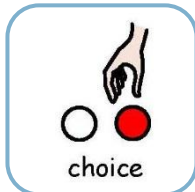
We asked people we supported what was important to them and used what they said to write the Dosh Promise.



✓ I will be able to use my money to do the things I want.



✓ I can be as involved as I want in my money.



✓ I will spend my money in the way that I want.



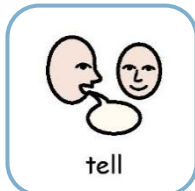
✓ I will get the information I want about my money in a way I can understand.



✓ I will have my own financial advocate who visits me, knows what I like and listens to what I want.



✓ My financial advocate will give me support and information to help me manage my money.

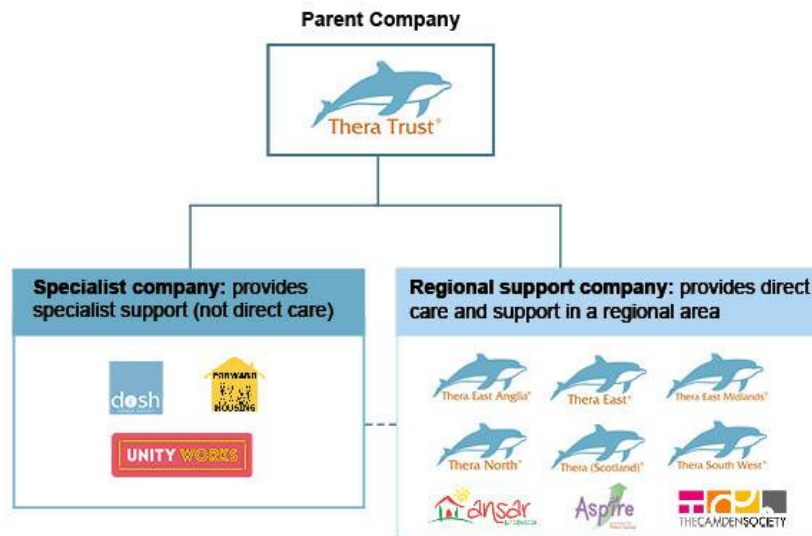


✓ Dosh will tell me about my money, what they are doing and answer any questions I have.



✓ Dosh will help me to keep my money safe.

# Group Structure

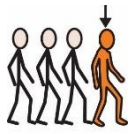


Dosh is an independent company within the Thera Group. Thera's group structure enables us to create local support companies and specialist companies like Dosh to meet particular needs and create bespoke services.

Each Thera company is led by its own Board of Directors, with responsibility for the strategy and management of the company.

The Group is led by Thera Trust, a registered charity (1090163) with an office based in Grantham, Lincolnshire. Thera Trust provides central support functions to all companies, such as finance, IT and HR; as well as development and innovative projects and leading the overall charitable purpose.

## Thera's Vision



leader

We will show that people with a learning disability can be leaders in society.



control

We will be controlled by people with a learning disability.



manage

People supported by us can say how their Thera company is directed and managed.



support

People with a learning disability will design the support they want from us.



respect

We will respect the rights and wishes of people at work, at home and in the community.



quality

People with a learning disability will check the quality of support from their Thera company.



charity

Thera Group will be led by a charity.

## **The role in a nutshell: Financial Assistant**

Purpose: To facilitate financial transactions for the people we support

Domain: Inputting payments and standing orders on Barclays.net and iPortal and making card payments on behalf of people we support

Accountabilities:

- Paying bills and invoices
- Setting up standing orders and direct debits
- Opening & closing Dosh bank accounts
- Transferring money via BACS
- Making credit and debit card payments
- Recording transactions on Docuware and summary/monitoring spreadsheets
- Checking and submitting payments
- Dealing with phone, email and postal financial enquiries (e.g. balance requests) from people supported and circles of support
- Sending regular updates on payments to Advocates
- Tracking authorisation times and sharing these with Systems Administrator role
- Contacting Barclays regarding account queries and bank charges
- Authorising payments up to £50 if advocate is unreachable.

## **Job Description**

Accountable to: Managing Director

In this role, you will be responsible for managing the financial transactions for the over 1700 people we support, as part of the Dosh Finance team. This is an essential role in ensuring the people we support can pay for things they need and do the things they enjoy. The Financial Assistant role includes inputting payments through our internet banking platform, setting up accounts, standing orders and direct debits, monitoring balances, maintaining spreadsheets and other monitoring tools, dealing with enquiries and developing new and improved ways to manage people's finances.

You will be working as part of the busy Dosh Finance team based in our Grantham office and working from home, in partnership with the Financial Administrator and other Financial Assistants, to manage payments for all individuals supported by Dosh. Alongside the finance work, the role includes administrative duties to support the Dosh office.

*As Finance Assistant, your duties will include:*

- Process payments through internet banking from Dosh managed client accounts as requested by the people we support and their Financial Advocates
- Deal with phone and email enquiries from people supported, their support teams and other partners in a prompt and professional manner
- Set up, amend and cancel standing orders and direct debits on behalf of the people we support
- Open and close managed bank accounts
- Protect operations by keeping financial information confidential
- Understand the legal frameworks within which the Thera Group and Dosh work
- Have a good understanding or work towards a good understanding of the benefits system
- Update information databases and storage systems and ensure that all entries are correct and up to date.
- Work closely with the Dosh administrative and financial advocacy teams
- Assist with monthly bank reconciliations
- Input data into an accounting package
- Other administrative tasks as required by Dosh

## Person Specification

	<b>ESSENTIAL</b>	<b>DESIRABLE</b>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>Evidence of commitment to ongoing personal and professional development</li> </ul>	<ul style="list-style-type: none"> <li>Business Administration and / or Finance &amp; Accounting Qualifications or equivalent experience</li> <li>NVQs or Diplomas in Care or equivalent experience</li> </ul>
<b>Knowledge and Experience</b>	<ul style="list-style-type: none"> <li>Working knowledge of Microsoft Office suite including Excel</li> </ul>	<ul style="list-style-type: none"> <li>Previous experience in a finance/ accounting role</li> <li>Previous knowledge of financial legislation</li> <li>Understanding of learning disabilities and/or social care</li> <li>Experience using an accounting platform e.g. SAGE</li> <li>Evidence of working strictly within the Data Protection Act / GDPR</li> <li>Experience of completing detailed financial reconciliations</li> </ul>
<b>Skills and Attributes</b>	<ul style="list-style-type: none"> <li>Ability to prioritise and manage time effectively</li> </ul>	<ul style="list-style-type: none"> <li>Ability to set own objectives and review</li> </ul>

	<ul style="list-style-type: none"> <li>• Ability to work as part of a team</li> <li>• Ability to work effectively under pressure in changing circumstances</li> <li>• Ability to communicate effectively to a variety of audiences</li> <li>• Personal values in keeping with Thera's vision</li> <li>• Ability to learn and use a range of software packages</li> <li>• Attention to detail and organisation</li> <li>• Numeracy skills</li> </ul>	<p>and adapt own performance</p> <ul style="list-style-type: none"> <li>• Ability to work on own initiative and develop "out of the box" solutions</li> <li>• Data entry and reporting skills</li> </ul>
<b>Personal Circumstances</b>	<ul style="list-style-type: none"> <li>• Willing to undergo a Disclosure and Barring Service (DBS) check</li> </ul>	
<b>Physical Attributes</b>	<ul style="list-style-type: none"> <li>• Good health evidenced by a good attendance record</li> </ul>	

# **Competencies**

## **Policy and Procedure**

1. Ability to ensure Dosh's policies and procedures are adhered to.

## **Monitoring and Reporting**

2. Ability to report on performance of the service delivered.

## **Problem Solving**

3. Ability to apply logic when solving a diverse range of problems.

## **Time Management**

4. Ability to manage your time and negotiate priorities.

## **Decision Making**

5. Ability to evaluate options and make operational decisions relating to the service.

## **Systems of Work**

6. Ability to ensure Dosh's processes are transparent and open to the scrutiny of people and regulators.
7. Ability to maintain meticulous records.
8. Ability to use a range of software packages including Microsoft Office suite and Docuware electronic filing system.
9. Ability to work to the highest standards of data protection and confidentiality.
10. Ability to contribute to and maintain robust safe systems of work and checking processes that protect people from financial abuse.

## **Charity and Company Law**

11. Awareness of the legal frameworks within which Dosh works.

12. Awareness of the limits of Dosh's activity and services.

## **Insurance**

13. Awareness of insurance liability and provision.

## **Continuous Professional Development**

14. Ability to manage own continuous professional development.

## **Pay and Benefits**

### **Hours of Work**

- Full time (39 hours)

### **Salary**

- £26,111.08 per annum

### **Annual Leave**

- 20 days' holiday + 8 bank holidays (218.3 hours per annum)

### **Notice Period**

- One month's notice period on either side (subject to employer's statutory increases).

### **Location**

- Combination of home working and Dosh office based in discussion with each individual and the team (Office: The West House, Alpha Court, Swingbridge Road, Grantham, NG31 7XT)
- Further travel may be required very infrequently, which may involve overnight stays.

### **Additional Benefits**

- Annual Pay Review
- Flexible working hours for work life balance
- Employee support line to support you and your family
- Continuous on the job training is provided
- Contributory Pension Plan
- Free nationally accredited training
- Contributory Pension Scheme
- Free Enhanced DBS check
- Cycle to Work Scheme
- Well-being initiatives
- Access to thousands of retail discounts including discounted Health Cash Plan

### **How to Apply**

All applications are processed centrally through Thera Trust's recruitment and resourcing teams, with shortlisting and interviews then undertaken by Dosh. To complete an application, please go to the Thera Group job application page: [www.thera.co.uk/careers](http://www.thera.co.uk/careers)

Please ensure that your application includes specific examples, which clearly demonstrate your competencies and skills. Offers are subject to Disclosure and Barring Service (DBS) checks.

We value **diversity** in our team and promote equality and inclusion across Dosh. We welcome applications from people of all backgrounds as we know that our diverse experiences, skills and interests make us stronger together.

**Interviews:** – will be confirmed with an email

**Start date:** on completion of employment checks

If you have any difficulty applying, please contact the Recruitment Team on 0300 303 1280 or email [newtalent@thera.co.uk](mailto:newtalent@thera.co.uk)