

# JOB DESCRIPTION

## MORTGAGE ADMINISTRATOR

### Is it a role for you?

You'll be a highly organised and experienced administrator with some familiarity with the mortgage industry. You'll be detail oriented and able to apply yourself to a wide range of tasks, playing a key role in a growing business. Working in a team will come naturally, as will taking the initiative to get things done on your own.

### Is it us?

[Describe type of mortgage brokerage you are, date established, type of business model, any awards won etc]

We're a growing and progressive mortgage brokerage based in [ ], [ ] people and counting etc

### Role

Joining a team of mortgage consultants, you'll be responsible for providing them with direct administrative support. You'll help with the research and production of new mortgage and protection business. You'll also be involved in processing all mortgage business from application stage to completion as well as providing great customer service to existing and prospective clients.

In addition to this, you'll be responsible for ensuring the efficient functioning of the office through a range of administrative tasks including day-to-day accounts, invoicing and maintaining office systems, processes and procedures.

### Responsibilities

Duties will include:

- Handling incoming emails and telephone queries.
- Dealing with correspondence and producing standard letters.
- Meeting and greeting customers.
- Liaising with lenders, insurance companies, solicitors and clients ensuring requirements are met such as medical examinations, obtaining evidence of earnings, completion of any questionnaires and recording and tracking these procedures on [Intelligent Office] [amend as appropriate].
- Entering new cases on [Intelligent Office] and keeping mortgage data updated.
- Reviewing progress of each case on [Intelligent Office] and keeping the system up to date.
- Providing Keyfacts illustrations along with other paperwork required by the consultants for client meetings.
- Submitting applications with relevant Money Laundering requirements and any other supporting documentation.
- Maintaining expected commission payments on [Intelligent Office].
- Ensuring acceptance terms and mortgage offers are received as promptly as possible and checking these against the application/illustration.



- Keeping our resources up to date, replenishing Terms of Business, Factfinds etc when required.
- Electronic filing of client correspondence and all other relevant documentation at the time of processing.
- Being responsible and accountable for sourcing and managing suppliers in relation to office operations and supplies, including; stationery; printing; facilities.
- Managing your workload and ensuring deadlines are met.

### Skills and competencies

- Attention to detail
- Reliability and adaptability
- Strong organisational and communication skills
- The ability to prioritise tasks and manage multiple demands on time and resource
- Strong IT skills
- Problem solving skills
- Strong interpersonal and team-working skills
- A high level of written and spoken English

### Experience

- Mortgage qualifications (eg CeMAP) preferred but not essential
- Demonstrable industry experience
- Good general knowledge of life and mortgage related products and legislation
- Previous experience of working in an office environment is essential
- Good working knowledge of Microsoft Office, [G Suite] and associated software

- Previous experience of [Intelligent Office] is an advantage but not essential, training will be given
- Experience in establishing and following processes and procedures
- Experience of working with a CRM system desirable

**Hours -**

**Salary -**

**Location -**

**Is it you?** Drop us a line at [ ]