



For Your Success

FINANCIAL SERVICES OUTSOURCING

GIVE YOUR BUSINESS
PERMISSION TO GROW





Many finance professionals are **missing the opportunity to write more business** because they are too busy with low-value admin tasks and not spending enough time in front of clients.

With **Beepo**, you can minimise the time spent on routine admin tasks and focus your time on the high-value tasks that make a real difference to your bottom line.

With the help of outsourcing, you can **supercharge your business for growth.**

GET STARTED NOW

As one of **Australia's leading outsourcing specialists**, we pride ourselves on offering businesses a distinct competitive edge in the finance industry. With a team of highly-trained, highly-skilled professionals, we can help kick-start your outsourcing journey immediately. At Beepo, you will have a full-time, virtual assistant that is **100% dedicated to your business.**



The team has really added value to us, not just in terms of the types of volumes we need to write but also in taking lots of administrative tasks off me. **I've cut two, maybe three hours of work out of every single deal** which frees me up to move onto the next task.

Stuart Pullar
Principal at Mortgage Choice
Ashgrove and Stafford

What support can we provide?

The Philippines has the third largest English-speaking population in the world, and one of the highest outputs of tertiary educated workers in the offshore industry. This positions the country as one of the best outsourcing locations in the world. Having access to such a large talent pool allows Beepo to provide your business with the best sales support possible.

Beepo can help in so many ways, here are a few:

MORTGAGE BROKING



Loan Processing and Packaging

Our team of highly-trained professionals can perform all of your loan processing tasks from packaging to settlement including:

- Set-up of loan application and data entry in CRM
- Collect, verify and follow-up supporting documents
- Prepare loan serviceability calculator
- Order property valuations
- Prepare and follow up discharge forms
- Prepare compliance documents
- Finalise complete loan file and lodge with lender
- Track loan through to settlement
- Regular follow-up with valuer, lender and mortgage solicitor and provide status update reports
- Notification of loan approval
- Complete settlement checklist
- Post settlement activities

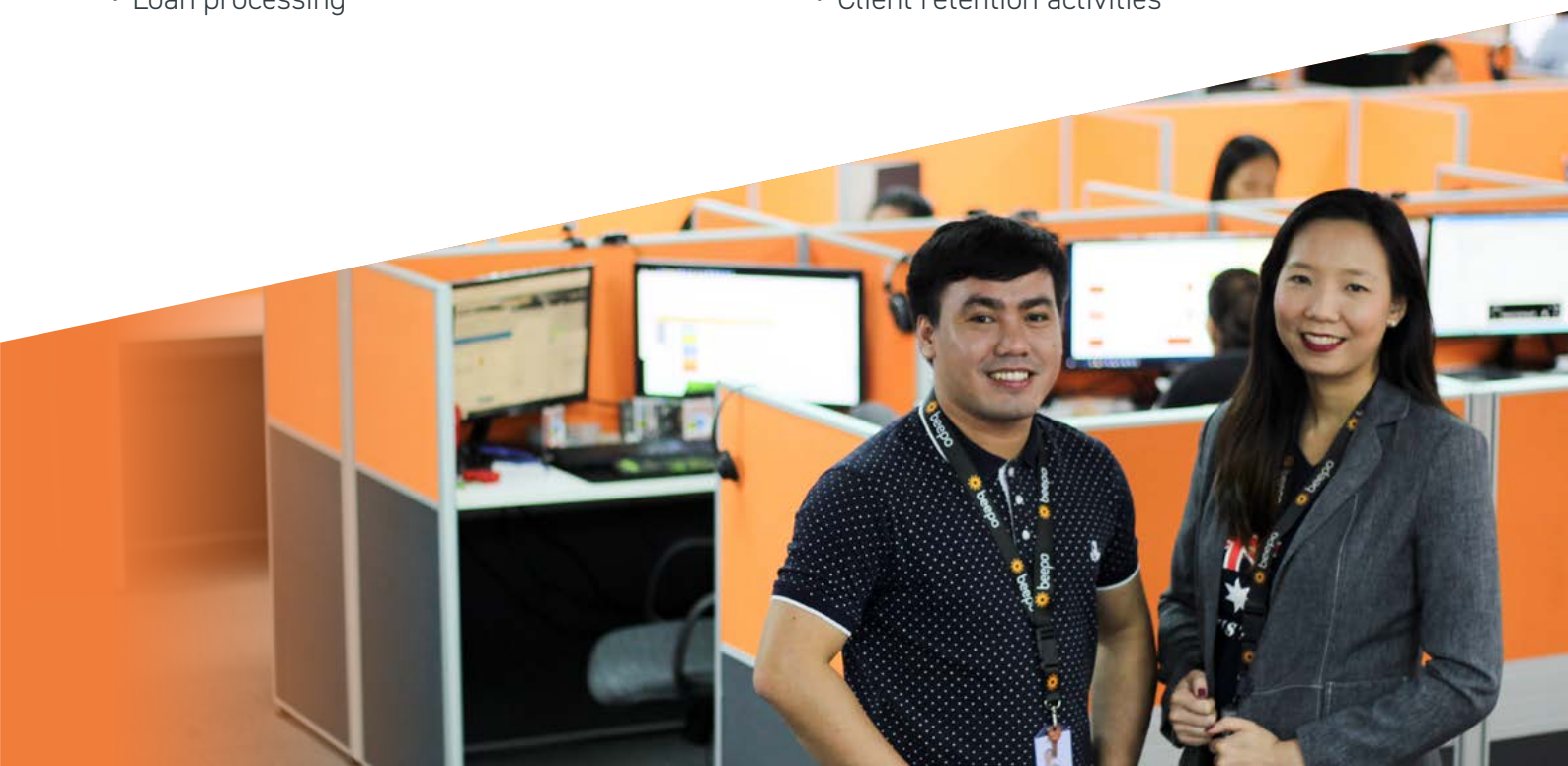
We all know that the gathering of support documentation is the most time consuming and therefore, the area where we can relieve the most pressure.



Support Officer

Meeting the needs of your business across a range of functions, including:

- Broker admin support
- Valuations, pricing, serviceability
- Loan processing
- Loan maintenance
- Database maintenance
- Client retention activities



Financial Services

We also offer a range of other positions across the financial services industry. These include:



Administration Assistants

We have a talented group of administration assistants with excellent multi-tasking and communication skills. They perform a diverse range of tasks including:

- Diary management
- CRM and database management
- Compiling and preparing reports, presentations and correspondence
- Liaising with staff, suppliers and clients
- Implementing and maintaining administrative processes
- Organising travel plans
- General admin duties

Depending on the needs of your business, we will find the right offshore professionals to help your business prosper.



Sales Support

Let our offshore sales support staff assist you and your staff in lead generation and nurture initiatives. They will be able to assist your business in a range of sale support tasks including:

- Telemarketing
- Appointment setting
- Live chat management
- CRM management
- Data cleansing
- Sales agent diary management

Our sales support staff will represent your business in whatever capacity you require.

We also offer specialised support in other roles (not listed) if there is a requirement for your business.

We can tailor our support to the needs of your business.

We have a highly-trained, highly-skilled professional team working with our financial services clients.

Our dedicated trainers will ensure your staff are well trained to hit the ground running and immediately add value to your business. Our team is highly proficient in a range of industry software, including:



Mercury



GET IN TOUCH TODAY FOR A FREE BUSINESS CONSULTATION

Let us help identify the best way for you to get started.



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