



Job Title: Broker Assistant

Date: July 2018

Business Name: Sunraysia Home Loans

Remuneration: In accordance with the Banking, Finance & Insurance Award 2010
Based on individual experience

Employment Status:

- Employee
- Contractor
- Trainee

Supervisor's Name: Teighan Lewis

Title: Business Development Manager

About us:

We are a group of high performers at Sunraysia Home Loans determined to stand out and make a difference in the finance industry. We are a fast-paced culture that keep it real and have a ton of fun with each other and our clients, but we are committed to getting the job done. In 2017, one year after opening our doors, we were named a top 9 finalist in the Australian Mortgage Awards for New Brokerage of The Year. We are on an upwards journey, kicking goals and making an impact.

Overall Purpose and Objective of This Position:

The Broker Assistant of Sunraysia Home Loans is the person that supports our brokers in delivering exceptional service to clients with a make it happen attitude. Your pro-active nature will see you making a difference and exceeding the expectations of our clients & your team. This is a role that will enable you to develop your finance prowess on the job and will present you with a great career opportunity in a growing industry.

You will act as first point of contact for clients & industry professionals, allowing you to make genuine connections and build your own personal brand. Your role is to take control of our client's journey, managing important due dates, maintaining file progression & liaising with industry colleagues regarding lending policy & requirements. You will work autonomously and thrive on accountability. You will be a key player in our team and will work extremely hard. In return you will be recognised and highly valued.

The Broker Assistant works closely with Sunraysia Home Loans Brokers & other Broker Assistant team members to ensure that all aspects of the business are operating at the highest level.

This is a pivotal role in the business as it requires an understanding of many different components of the business, the people within the business, and ensures everyone is being supported at an administrative level.

Roles and Responsibilities:

Client journey

- Deliver exceptional service to clients with a “make it happen” attitude in line with our company values
- Determine personality types to exceed clients and business partner expectations
- Communicate with clients in a jargon free and personalised manner
- Build rapport and form genuine connections with clients, sharing in their journey with moments of empathy and excitement pending their circumstances
- Provide regular phone and email updates on loan progress

File Management

- Collate, review and assess client documentation for compliance purposes & loan submission
- Communicate with clients to request outstanding documentation in preparation for loan input
- Process First Home Owners Grant applications as required
- Input loan application & council clients on bank policy
- Handle bank exceptions, milestones and outcomes to ensure file progression
- Confer with banks & credit officers for scenario and application assistance
- Preparation of loan documentation

Manage finance and settlement dates

- Manage finance and settlement dates accurately in CRM according to company policy
- Liaise with solicitors, conveyancers & appropriate industry colleagues with updates and extension requests

Strategic partnerships

- Maintain regular contact with strategic partners/ industry colleagues regarding file updates and progression
- Build rapport and nurture relationships with strategic partners/ industry colleagues keeping business outcomes top of mind

CRM management

- Maintain accurate data input
- Adhere to and follow CRM processes & tasks
- Manage daily tasks efficiently, prioritising in order of importance

Front of house – The broker assistant role is first point of contact with clients over the phone and in person, this role requires you to:

- Confidently and enthusiastically greet clients and answer phone calls
- Assist with general enquiries
- Manage incoming & outgoing mail

Client Appointments

- Manage broker diary & book client appointments
- Prioritise client booking requests based on level of urgency & broker workload
- Confidently pre-qualify clients
- Confidently assist with client queries providing basic home loan facts and performing basic lending calculations
- Strictly follow Sunraysia Home Loans appointment booking process for compliance and sales purposes

Email Management

- Manage email inbox for broker, broker admin and loans account
- Respond and take necessary action in a timely manner
- Maintain professional email etiquette

Self-Development and Training

- Complete Certificate IV in Finance & Mortgage Broking – Course funded by Sunraysia Home Loans to be completed in employee's own time
- Complete any industry specific training requested by Sunraysia Home Loans via webinar, online sources, in house or away if required
- Seek professional development through industry newsletters, Facebook groups, blogs etc.
- Possess a keen interest in your professional and personal growth & development

General office duties

- Maintain stock levels for stationary, business cards, postage items, bank documentation
- Prepare client information folders
- Ensure neat & tidy presentation of front office including tile floor area
- Other duties as requested

Expectations:

The Broker Assistant is expected at all times to:

1. Conduct themselves with a highly positive, energetic & contagious attitude
2. Have a pro-active approach & be happy to help where necessary
3. Have a hard-working attitude
4. Take ownership of their own learning & development
5. Follow all set tasks & procedures efficiently & to deadlines
6. Present confidently, trusting in their own & the teams abilities
7. Be a team player
8. Connect with each client's journey displaying an empathetic approach
9. Listen to and give feedback where required and be willing to grow from it

Characteristics and Skill-Sets:

1. Strong communication skills with the ability to adapt your delivery to individual clients and assert yourself when required
2. Ability to prioritise & self-regulate in a high-pressure environment whilst maintaining high performance standards
3. Strategic thinker and innovator
4. Ability to read and connect with people, build rapport and form authentic relationships
5. Passion for high levels of customer service with a make it happen attitude
6. Self-accountable
7. High attention to detail
8. Hunger to learn

Sales

The role of a broker assistant with Sunraysia Home Loans does not require you to be actively selling a product or meeting sales targets. However, it is important to understand the sales process and that every interaction with our clients is a point of sale.

For the broker assistant to support the broker successfully they must have an understanding and appreciation for the following:

- Lead generation, pipeline & conversion
- Qualification and nurturing a lead
- Importance of impressions, customer service and client retention
- Referral partners, client referrals and repeat business

How to apply

If this excites you and you believe you would bring your own unique contribution to our team, send your cover letter and resume outlining why you're the person who is going to help us succeed.

Please direct applications to Teighan Lewis via email prior to 5pm Friday 27th July 2018.

Email: teighan@sunraysiahomeloans.com.au