



Job Title: Executive Assistant- Full Time Position

Business Name: Sunraysia Home Loans

Remuneration: In accordance with the Banking, Finance & Insurance Award 2010 based on individual experience (**Salary range \$40,000-\$55,000**)

Supervisor's Name: Simon Lewis

Title: Head Broker/Owner Operator

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 Executive Assistant of Sunraysia Home Loans will support Simon Lewis (Business Owner and lead broker) 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 Executive Assistant will work predominantly with Simon Lewis and with the broker support team 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
- 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 & counsel 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/ Client Appointments

The Executive 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 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 multiple email inboxes
- 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
- Possess a keen interest in your professional and personal growth & development

General office duties

- Monitor 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 Executive Assistant is expected at all times to:

1. Conduct themselves with a highly positive and energetic 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. Experience in finance or similar industry is preferred
2. Strong communication skills with the ability to adapt your delivery to individual clients and assert yourself when required
3. Ability to prioritise & self-regulate in a high-pressure environment whilst maintaining high performance standards
4. Proficiency in Microsoft Suite of products including Word, Excel and Outlook
5. High level of computer literacy
6. Strategic thinker and innovator

7. Ability to read and connect with people, build rapport and form authentic relationships
8. Passion for high levels of customer service with a make it happen attitude
9. Ability to work autonomously
10. Possess a high attention to detail

Sales

The role of a Executive Assistant with Sunraysia Home Loans does not require you to actively sell a product or meet individual 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 Executive 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 role excites you and you believe you would bring your own unique contribution to our team, please send your cover letter and resume for consideration.

Interviews may be conducted and a suitable candidate selected prior to the closing date dependent on applications received.

Please direct applications to Teighan Lewis via email prior to 5pm Friday 1st February 2019.

Email: teighan@sunhl.com.au