

position profile.

Team	Bartons Lending Services
Position	Mortgage Broker
Direct report	Matt Stouppos
Employment status	Full time
Working days	Monday to Friday
Hours	8:30am – 5:30pm
Current as at	17 August 2017

It is not the intention of the position description to limit the scope or accountabilities of the position but to highlight the most important aspects of the position. The aspects mentioned below may be altered in accordance with the changing requirements of the role.

Position objective

Working as part of a positive close knit team and culture, this role will focus on developing new business opportunities, building strong client relationships and broking end to end financial solutions for home, investment, personal or asset finance loans.

The position reports to the Associate Director - Lending and the scope of the role will include but not be limited to the following:

Key responsibilities

- Business development
 - Develop new and repeat business opportunities
 - Develop and maintain excellent trusted client relationships
 - Solutions base sales experience
 - Ability to work collaboratively and cross refer within a professional integrated service firm
 - Ability to be highly responsive to concluding work for clients
- Experience & qualifications
 - Proven experience in end to end broking – home loans, investment loans, personal loans, asset finance
 - Approved and current qualifications in mortgage broking
 - Experience in online lodgement
 - Lender credit policy knowledge

- Knowledge of compliance requirements under NCCP/Responsible lending practice
- Banking /mortgage broking experience
- Quality, productivity and planning
 - Proactively identify and manage risk and in communicating job status and emerging issues
 - Continuously apply a high level of self-review to work
 - Independently manage work flow and self
 - Continuously seek ways to improve work that adds value to the client and Bartons
 - Produce work to a high quality and professional standard
 - Recognise delays and communicate to managers in a timely manner
- Key performance indicators (KPI's)
 - Meets all productivity and service targets consistently
 - Effectively use of and prioritise work
- Client service
 - Engage personally with clients and build strong working relationships
 - Experience working with aspirational & professional client base
 - Focus on identifying and delivering solutions aimed at adding value and that are in the best interest of clients
 - Deliver on promises and meet all deadlines
 - Respond quickly and positively to client requests
 - Build positive rapport with all clients
 - Maintains confidentiality at all times
 - Work closely with financial services and accounting division to identify and assist with client referral opportunities
- Personal qualities & integrity
 - Work independently and follow through without direction
 - Demonstrate a very high level of professional standards
 - Honest, ethical and trustworthy
 - Able to accept responsibility and to own the role
 - Proactive and solutions driven
 - Comfortable in reaching out for help and assistance when required
 - Follows and upholds firm procedures
 - Demonstrates high level of initiative
 - Shows commitment to the firm and the role
- Team work
 - Build and maintain a professional working relationship with all team members, managers and directors

- Demonstrate a team attitude and have the ability to work effectively in groups
- Generate creative solutions work related matters
- Proactively contribute to team meetings
- Assist others by sharing knowledge and mentoring
- Adopt a whole of firm approach
- Systems and software
 - Utilise computer-based knowledge in the most cost effective and time efficient manner
 - Seek to continually improve upon current knowledge and skill base, for all relevant hardware, software and information management systems
 - Experience in the use of the following:
 - Word, Excel, Podium/Salesforce or lender online lodgement systems (not mandatory)
- Communication skills
 - Build and maintain excellent interpersonal skills with fellow staff and clients
 - Work consistently in a collegial and professional manner
 - Express opinions and ideas clearly and confidently – both verbal and written
 - Be prepared and organised ahead of meetings and be prepared and acts on outcomes in a timely manner
 - Assists with training when required
- Other professional and leadership objectives
 - Work with the Directors and Manager to supervise staff members as may be required
 - Provide support and development of more junior staff in a mentor, as may be required from time-to-time
 - Participate in firm wide performance and development program
 - Attend regular training and professional development relevant to the role
 - Maintain CPD requirements of industry body
 - Meet ongoing training requirements to maintain lender accreditations
 - Participate in firm wide community and philanthropic initiatives
- Preferred qualifications
 - Certificate IV in Mortgage Broking

Signed

Name

Employee

Date

Signed

Name

Title

Date