

ROLE PROFILE

JOB TITLE	MORTGAGE ADVICE AND UNDERWRITING ADMINISTRATOR
FUNCTION	OPERATIONS
REPORTING TO	MORTGAGE ADVICE MANAGER
REPORTEES	NONE

JOB PURPOSE

To provide administrative support to the Mortgage Advice and Underwriting teams in accordance with Society policy and procedures, providing high quality customer service and ensuring the delivery of positive customer outcomes whilst contributing to continuous improvement within the mortgage department.

KEY RESPONSIBILITIES

- Provide an effective and efficient point of contact for new mortgage customers, taking details of enquiries, booking appointments with advisers, and issuing confirmation to the customer.
- Packaging incoming mortgage applications, to include;
 - Acknowledging receipt to the customer and keeping them updated with anticipated timescales for processing,
 - Checking for and requesting any outstanding information/items,
 - Requesting Solicitors Panel Applications
- Instructing mortgage valuations.
- Filing documents and completed mortgage files.
- Assisting with mortgage product maturity mailings, producing mortgage illustrations and product switch packs notifying customers of the processing requirements.
- Accurately update customer data and mortgage account records.
- Deal with all customers with a mind to achieving positive customer outcomes, recognising vulnerable customers and acting appropriately.
- Contribute to the continuous improvement of service, systems, procedures and policy to ensure they meet and reflect the Society's core values, risk appetite and business requirements.
- Monitor and report as required, including the continual update of internal tracking documents.
- Maintain and apply compliance knowledge relevant to the role.
- Assist with daily incoming post.
- Accurately scan and index customer documentation.
- Undertake any other duties or projects that may be regarded as relevant to the job role.

SKILLS AND EXPERIENCE

- Excellent customer service skills
- Working knowledge of mortgage products and application process
- Strong administrative skills
- Good telephone skills
- Planning and organising skills
- Attention to detail
- Team worker
- Self starter with a can do attitude