

## **Position title: Mortgage Broker**

Wealthy You is an established and progressive finance company with office located in Sydney CBD (two minutes walk from Wynyard train station). We offer our clients professional financial solution with the aim to assist in building their property portfolio.

Due to continuing growth, we have a position available within our CBD office. We provide you leads, great working environment and opportunity to grow with the company.

As a Home Loan Specialist your primary function will be to service the home loan needs of new and existing clients. Your duties will require you to manage all aspects of the home loan process including:

- Provide lending solutions that best meet the customers' needs and financial situation.
- Conduct loan interviews and make recommendations.
- Data entry and submission of home loans.
- Execution of loan documents.
- Liaise with lenders to track the progress of an application.
- Meet responsible lending compliance obligations.

## **Skills and Experience:**

- A minimum of 2 years in sales/finance industry.
- Someone currently in a assistance broker role looking to step into mortgage broker (considered).
- Existing mortgage broker struggling to generate leads.
- Excellent communication (verbal and written) and attention to detail.
- Good understanding of compliance and NCCP requirements.
- Display good understanding of credit policies.
- A positive and proactive approach.
- Knowledge of Apply Online is beneficial.
- Satisfactory National Criminal History Record (Police Check) and Anti-money laundering check will be required prior to commencement.
- Diploma of Finance and Mortgage Broker qualification required.

## **Smart Technology:**

- Message read receipts with a timestamp to know when to follow up.
- Automated bank statement collection tool with living expense analysis.
- User friendly document collection portal for customers to access.
- Automated redaction of Tax File Number from documents collected.
- Prompts to make doing business easier – calendar pop, availability.
- Powerful Email automation and intelligent SMSbot using smart automation to drive .more engagement and better experience from leads and clients.
- Nurturing for existing and new clients.

## **Remuneration and Benefits:**

- Commission only.
- Dedicated office space with computer.
- We will provide 15 – 20 leads per month (or more if you have capacity and achieve the required conversion rate).
- Average loan size \$400K.
- We cover PI, AFCA, MFAA or FBAA membership, aggregator and software costs.
- We register you with CRM system and pay all cost.
- Access to loan processing team (so you can focus on building relationships with your clients).
- Email set up/business cards, ongoing cost covered by the company.
- Ongoing Mentoring.

**At Wealthy You, we can offer you a rewarding career and lifestyle opportunity that is provided within a supportive team. If you believe you have a can-do attitude, friendly and a drive to succeed. Please send your resume and covering letter to [info@WealthyYou.com.au](mailto:info@WealthyYou.com.au).**