

Job Description – Client Services

Position Title	Client Services
Department	MoneyQuest Wollongong
Reporting to	Client Services Manager/ Finance Specialist
Summary of Role	This role will encompass various activities including Office Administration, Processing Home Loan Applications (data entry only), Liaising with Bank's, Solicitors, Client's and Business Partner's.
Relationship to Other Positions	Work with the Client Services Manager & Finance Specialist.
Skills & Knowledge Required	Qualifications <i>Preferred</i> <ul style="list-style-type: none"> • <i>Ideal candidate will have Banking or experience working in a solicitors office attending to settlements</i>
	Competencies <ul style="list-style-type: none"> • Understanding of the financial services industry.
	Skills <ul style="list-style-type: none"> • Ability to communicate at all levels. • Communication skills & commitment to performance excellence. • Commitment to work within clearly defined business processes. • Ability to prioritise work. • Ability to quickly learn the features & functionality of appropriate mortgage broking software & other business systems.
Duties & Responsibilities	<ul style="list-style-type: none"> • Make appointments and complete new appointment checklist and items noted on checklist • Ensure files are ready for client appointments • Confirm client appointments • Complete paperwork required for Finance Specialist to complete appointments • Review Diary Notes and input tasks as noted on Diary Note • Complete daily postage • Ensure offices are cleared, cleaned • Assist Finance Specialist with preparation of documents • and stocked before and between appointments • Ensure all business equipment is operational and stocked on a daily basis • Answer telephones, as required • Manage all ongoing & prospective client communication via phone, mail / e-mail, to ensure clients are always fully prepared for all appointments. • Communicate with clients via phone, mail / e-mail, to ensure they are kept up to date regarding the progress of their loan applications. • Meet & greet all clients / prospective clients when they are visiting the business, ensure their comfort & all queries are addressed. • Respond to day to day queries from clients • Order valuations, relating to reviews, variations and loan increases • Liaise with Banks and keep clients informed of the progress of their loan applications, where necessary. • Liaise with solicitors and keep them informed of progress of client files for settlement • Files are to be accurately scanned and kept in business systems. • Ensure all client data is accurately recorded in all business systems. • Complete any duties allocated by the Client Services Manager or Finance Specialist, as required • Ensure all relevant work assigned in accordance with any training is completed on time.
Measures of Success	Key result areas for this role are as per job description:
Location	72 Auburn Street Wollongong