



## Lending Consultant

Squirrel is growing at a rapid pace and to ensure that our Mortgage Advisers have the support they need to provide the outstanding service our clients know and love, we are now taking Lending Consultant applications as part of our Broker Training Program from top grads or those who are a few years into their careers in the financial industry with strong interpersonal skills, who love helping others and who dream of becoming exceptional Mortgage Advisers themselves.

### **Some details about the role:**

The primary role of a Squirrel Lending Consultant is to work within their assigned 'pod' of Advisers, managing the effective delivery of a successful and positive end-to-end experience for Squirrel clients. Lending Consultants are pivotal to enabling Squirrel Advisers to competently and capably take on additional workload, knowing that their clients' mortgage applications and review process is well managed. In return, Lending Consultants will receive mentorship and training from some of the best Mortgage Adviser in the business to develop and hone their advisory skills over a period of 3-4 years and graduate as Squirrel Mortgage Adviser who know the business inside and out.

### **Specifically, Lending Consultants are accountable for:**

- Providing an outstanding Squirrel client experience both over the phone and via email.
- Responding to queries and online applications from potential and existing clients via our lead automation process.
- Pre-qualifying queries and offering sound knowledge to clients on processes and products before referring to a Squirrel Adviser.
- Liaising with lending institutions to gain pricing and loan information to assist with client's structure discussions.
- Assessing clients' online mortgage applications by collecting, and processing mortgage applications.
- Providing guidance to clients on consumer finance, insurance and mortgage products with the ability to spot and present them with sound opportunities.
- Sending out pre-approvals and working with clients and banks regarding conditions, re-fixes, loan maintenance, top ups and interest-only processes.
- Working with banks and clients around correct documents and application process.
- Taking structure confirmation from advisers, confirming with solicitors, entering deals and submitting them into banks.
- Complete deal assessment with different lenders, writing diary notes and ensuring all customer details are recorded and updated on CRM including at time of review.

### **Who we are looking for:**

To be a good fit for this role, you are a graduate (ideally with a degree in (commerce, business or property) who dreams of becoming a Mortgage Adviser and is passionate about the property and the mortgage industry.

The successful applicant will love supporting our advisers and their clients, adore the Squirrel brand, be fluent in English, driven, self-confident and fantastic with people. No previous banking experience is required but experience in the financial industry is a



plus. You'll be someone who understands the impact that amazing service can have when people are making life-changing decisions – be it about their mortgages, first-home buying, investment properties and so much more. We go to the ends of the earth for our clients, and you'll help us to do it.

If what you've read so far ticks your boxes and you think you could be the Squirrel we're looking for, we'd love to hear from you!

Email [work@squirrel.co.nz](mailto:work@squirrel.co.nz) and make sure to include your CV, a copy of your University transcript and a cover letter telling us what you can bring to our team.