

POSITION DESCRIPTION

TITLE: **Adviser Administrator**

DETAILS	
Reports to:	Head of Adviser Operations
Location:	29 Sale St or Wellington
Type of Position:	Part-time
Remuneration:	Salary
Last updated:	December 2023
PURPOSE AND SCOPE	
<p>Squirrel is an iconic kiwi mortgage company, obsessed with leveling the playing field for Kiwi Homeowners and Savers. Our Advisory team are experts at connecting homeowners with a mortgage solution that is the best fit for them, and our lending and investing teams at creating opportunities for Kiwis to invest in the mortgage market – and provide our own unique home loan solutions to serve people who don't tick traditional lending boxes.</p> <p>The role of our Adviser Administrator is a key role within our advisory business, responsible for supporting our Head of Mortgage Operations manage tasks involving, Compliance, Quality Assurance, Training, Accreditation, and reporting.</p> <p>The Adviser Administrator role is accountable to but is not limited to:</p> <p>Training, Development and Accreditation:</p> <ul style="list-style-type: none"> • Coordinating new adviser accreditations • Organizing and updating CPD training for Advisory • Coordinating product and third-party training for advisory • Coordinating internal training and updates • Ongoing management and renewals of regulatory memberships • Support in creation and update of process documents <p>Quality Assurance:</p> <ul style="list-style-type: none"> • Monthly reporting • Coordinate monthly QA checks across all Squirrel and The Home Loan Shop Advisers • Ongoing management of QA Register, including updating outcomes • Reporting outcomes to Head of Mortgage Operations <p>Complaints and Incidents:</p>	

- Be the first point of contact for incoming complaints, incidents, and feedback.
- Management of acknowledgements and escalation
- Updating and Management of Complaints, Incidents and Feedback register
- Coordination of full review

Administration:

- Managing Advisor leave
- Reporting upcoming leave to Head of Adviser Operations

KEY WORKING RELATIONSHIPS

Internal	<ul style="list-style-type: none"> • Mortgage Advisers • Account Managers • Client Services • Squirrel Support • Squirrel Money • Risk • Finance • Human Resources
External	<ul style="list-style-type: none"> • Product providers- banks and non-bank lenders • NZFSG

THE SQUIRREL DIFFERENCE

People First	People matter most. Do right by clients & each other.
Challenge the Status Quo	Innovate. Be bold. Be agile.
100% In	Commit with passion, energy & positivity.
Make it Easy	Keep it simple for clients & those we work with.
Knowhow	Grow & share knowledge to empower clients & the team.

KNOWLEDGE AND TRAINING

Education and training	<ul style="list-style-type: none"> • Finance, property, or business qualification is preferred
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Previous Experience	<ul style="list-style-type: none"> • At least 2 years' experience working within a lending institution. • Understanding of the consumer and home lending process, through working in a Bank, Finance Company, or Mortgage Adviser Business.
Technical Skills	<ul style="list-style-type: none"> • A wide range of computer skills with a provide ability to use MS office applications. • High attention to detail

Deliverables

<i>Key Deliverable</i>	<i>Means of Achieving</i>
Training and Development	<ul style="list-style-type: none"> • Coordinate learning and development sessions across advisory • Coordinate induction plans for new staff. • Coordinate and manage CPD training across advisory to ensure all advisers meet regulatory requirements. • Coordinate adviser accreditation for all new advisers
Complaints	<ul style="list-style-type: none"> • Coordinate responses to complaints to meet Squirrels complaint policy and regulatory requirements. • Escalate and manage escalation process to ensure Squirrel is meeting its obligations.
Quality Assurance	<ul style="list-style-type: none"> • Coordinate Quality Assurance reporting
Being a Squirrel	<ul style="list-style-type: none"> • Reflecting Squirrel values through behavior and mind set.

WORKING HOURS / LOCATION

This role will be based in our Squirrel HQ Office, 29 Sale Street and may require travel to meetings from time to time. Regular working from home is also possible with prior agreement in accordance with our Working from Home Policy.

Our standard working hours are 8.30am – 5.30pm, but we are happy to accommodate a flexible schedule.