

Position: **Mortgage Administrator**

Date Posted: **11/06/2017**

Our mission requires technically brilliant minds, creatively-charged souls, and a passion for making the financial industry a better place. Our environment is energetic and collaborative with competitive pay and benefits. Plus you get to work on making a real difference in people's lives.

We are looking for someone to join their team as a Mortgage Administrator to support our head of mortgages with applications and closing deals, and the required administrative tasks.

Our clients are really smart and know that they need to plan well for their future, so they reach out to us to start their mortgage process. You will review their file and consolidate all the client's data to onboard. This process involves coordinating with our sales team to collect data, administrate client forms, and document all activities on our CRM (customer relationship management) system.

The most important characteristic of our support team is that we love helping clients reach their financial goals! We are trusted with sensitive data, and we believe it is our responsibility to ensure that our clients, and their information, are treated with respect and responded to efficiently.

Mortgage Administrator has an eye for detail, knows who, how and where to direct their communication, and loves working in a team. While knowledge about different mortgage applications and underwriting processes are helpful, we can always teach you ;)

**General Job Description:**

- To assist with application entry in the Filogix Expert mortgage origination software with excellent proficiency
- Ongoing tracking, process management and data verification with solid understanding of the mortgage origination process
- Help with new & existing client management and follow up
- Responsible to keep CRM (Salesforce) and Mortgage Management Software up to date
- Provide support to the Mortgage Underwriter in handling, following up, and submitting client documents
- Participate in client relation discussions and post-mortgage client follow up
- Making outgoing & answering incoming calls.
- Potential for leadership role

## We Have:

- Competitive salary and compensation structure, including options
- Beautiful, open-concept working environment conveniently situated in downtown Toronto
- Generous group benefits package
- Company events
- Frequent office lunches
- A team of ballers to work with
- An open mind for new ideas

## You Have:

- Mortgage Agent or Broker FSCO License (or willing to acquire)
- Minimum completion of university degree/post-secondary education
- Minimum 1-2 years of banking, credit or mortgage experience, preference to the mortgage broker industry in Ontario acting under FSCO requirements
- Excellent written and verbal communication skills
- Ability to multi-task and work in a fast-paced environment
- Ability to work in a team and independently
- Strong computer & technology skills

## You Might Also Have:

- General financial knowledge including literacy around personal financial retirement planning & cash-flow
- Customer Service experience
- Office Admin experience
- Customer Relationship Management (CRM) system experience

Please send a cover letter and resumé by Friday, November 24th, 2017 to [careers@planswell.com](mailto:careers@planswell.com) with subject line "Mortgage Administrator - {YOUR NAME}".