



Basic Description: Mortgage Broker Virtual Assistant (VA)

Instructions: Please complete this job description form with the key skills and attributes that you desire in order to carry out the critical functions of the position. The more detailed your descriptions the better chance we have of finding the right candidates for the intended job. The sooner you return this form the sooner we can find your new staff member. The tables are pre-filled with examples only – your input is required.

Business Essentials

Job Description

We are looking for a Virtual Assistant that has experience in handling real estate mortgage application in New Zealand to provide administrative support while working remotely. Someone who's organized, diligent, pays attention to small details and able to handle administrative projects and deliver high-quality work under minimum supervision.

Most Critical Business Functions

Priority	Function	Remarks
	Overall Mortgage Broker job description	<ul style="list-style-type: none"> • Preparing servicing calculations, calculating funds required for settlement, understanding the construction of loans, compliance documents, understanding banking policy and requirements. • Pricing, packaging application for online submission to banks and apply online system. • Put together loan applications ready for submission to the bank, this includes detailed loan servicing calculations. • End- to-end processing for all loans until settlement. • Liaise with customers via phone or email to collect details and documents for loan assessment. • Liaise with stakeholders (e.g. Banks, Lenders, Key Stakeholders such as the business manager and director) • Respond to all enquiries professionally, accurately and in a timely manner. • Provide relevant stakeholders as appropriate, with timely and periodic updates regarding loan applications, by email and other accessible means of communication. • Working with mortgage management systems • Provide support with other administrative function • Be a point of contact for loan enquiries both online and over the phone

JOB DESCRIPTION – CUSTOMER INPUT

		<ul style="list-style-type: none"> Provide lending support as required including assisting clients, gathering renewal information, application process and management and lender/provider follow ups
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Other Important Business Functions

Task No	Function	Remarks
1	Customer Data Sheet	Prepare customer spreadsheets and keep online records Sending Birthday emails to the clients
2	Managing Manager's Calendar	Organize managers' calendars, diary and schedule meetings
3	Customer Service	Communicating with the client for any conditions necessary prior going unconditional
4	Clerical/Admin Services	Provide high-quality administrative and clerical assistance to top-level executives
5	Market Research	Help with Social Media Marketing. (Google Ads, Blogs)
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Desired Education, Technical Skills, Background and Personal Attributes

Education

Item	Description
	<p>Bachelor's Degree in Marketing, Business Administration, or relevant discipline</p> <p>To succeed in this role, you will have:</p> <ul style="list-style-type: none"> A minimum of 2-3 years proven experience in the banking or mortgage broking industry Strong numerical skills Have excellent communication skills both written and verbal Excellent computer skills, particularly in Excel and the whole MS Office suite

JOB DESCRIPTION – CUSTOMER INPUT

	<ul style="list-style-type: none"> • Have a high standard of customer service • Strong attention to detail and high accuracy • A great team player who is enthusiastic, positive, and willing to get in there and 'get the job done' • A 'go getter' that enjoys working in a fast-paced environment who can meet tight deadlines and can perform well under pressure.
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Technical Skills

Item	Description
1	Familiarity with current technologies, like desktop sharing, cloud services and VoIP*Experience with word-processing software and spreadsheets (e.g. MS Office)
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Background

Item	Description
1	Has 2-3 years work experienced as a Virtual Assistant/ Mortgage Broker
2	Additional qualifications as an Administrator or Executive Assistant
3	Has proven experience in processing real estate mortgage application for New Zealand and Australia
4	Accounting experienced is an advantage
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Personal Attributes

Item	Description
1	Strong time management and organization skills
2	Excellent communication and interpersonal skills
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JOB DESCRIPTION – CUSTOMER INPUT

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Other

Item	Description
1	Someone who can work unsupervised and have an ambition to become a team leader
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