

## JOB DESCRIPTION

<b>Job title:</b>	Mortgage Adviser
<b>Location:</b>	Weymouth
<b>Reports to:</b>	Office Manager

### Main job purpose

The post holder will provide customers with an independent mortgage advice and recommendation service and when required provide office support

### Main responsibilities and duties

1. To liaise with customers face-to-face, via phone, Zoom and email, offering independent mortgage advice including life and home insurance
2. Complete comprehensive fact finds and take detailed notes relating to each enquiry by using effective questioning skills to assess the needs and circumstances of the client
3. Ensure all advice given complies with the companies and the Financial Conduct Authorities requirements
4. Present recommendations in a clear and concise manner whether it is verbal or in writing
5. Maintain a good understanding and knowledge of the sourcing software used and changes to lenders criteria and product types
6. During fact find process, gather sufficient information to establish the customer's needs for any further products and/or services that Money Matters FS Ltd offer
7. Responsible for ensuring clients data is handled and stored safely, confidentially and in accordance with GDPR guidelines
8. Keep active case files up to date, taking responsibility for ensuring all correspondence and paperwork that relates to the case is completed and processed in a timely manner
9. Ensure that all CPD is up to date and regularly logged using Money Matters FS Ltd systems
10. Some reception duties will be required at our Park Street office premises
11. Any other lesser or comparable duties as required

### Supervision & management

1. The post holder will be required to work under the direct supervision of the line manager
2. The post holder will generally not be required to supervise other staff

### Resources

1. The post holder will have shared responsibility for small items of equipment
2. The post holder may have some responsibility to handle small amounts of cash

### Working Environment

1. Work is subject to interruptions to deal with queries from clients via telephone or face to face
2. Majority of work will be computer/keyboard based, but with regular opportunities for paperwork and other administrative related duties to be completed