

PERSON SPECIFICATION

Job title:	Mortgage Adviser
Location:	Weymouth
Reports to:	Office Manager

CRITERIA	EVIDENCE (See Key)
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EDUCATION AND PROFESSIONAL QUALIFICATIONS

Essential

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| 1. A minimum of 5 GCSEs grade A - C, 2 of which must be Mathematics and English, or equivalent ability evidenced from testing | 1 & 2 |
| 2. Certificate in Mortgage Advice & Practice (CeMAP) or equivalent | 1 & 2 |

Desirable

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| 3. ECDL or equivalent IT or typing/word processing qualification | 1 & 2 |
| 4. Equity Release qualified (CeRER or equivalent) or willing to obtain this qualification after probation passed | 1, 2 & 3 |

KNOWLEDGE AND EXPERIENCE

Essential

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|---|-------|
| 5. "Competent Adviser" within existing mortgage advice role for at least 1 year (if applicable) | 1 & 3 |
| 6. Advising on owner-occupier and buy-to-let mortgages | 1 & 3 |
| 7. No upheld complaints within the last 2 years | |

Desirable

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| 8. Experience of offering Whole-of-market "Independent" advice | 1 & 3 |
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SKILLS AND ABILITIES

Essential

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| 9. To have expert knowledge of Advised Sales including knowledge of Mortgage Compliance | 1 & 3 |
| 10. To have expert knowledge of the mortgage market and be able to communicate it clearly and concisely | |

Desirable

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| 11. Experience of using mortgage sourcing software systems in current or previous roles e.g. Iress/Trigold | 1, 3 & 4 |
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PERSONAL ATTRIBUTES

Essential

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| 12. Expert at networking and communication | 1 & 3 |
| 13. Excellent interpersonal skills, with the ability to interact with a wide variety of individuals and organisations | 1 & 3 |
| 14. Ability to develop strong working relationships with colleagues and third-party product providers | 1 & 3 |
| 15. Confident, clear and professional telephone manner | 1 & 3 |

Evidence method of criteria

1. Application form 2. Sight of certificates 3. Interview 4. References

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|---|----------------|
| 16. Ability to apply confidentiality to all information handled | 1 & 3 |
| 17. Ability to work to a high level of accuracy, with excellent attention to details | 1 & 3 |
| 18. Driven and determined with the ability to work independently and the ability to come up with solutions on their own | 1 & 3 |
| 19. Good keyboard and IT literacy (including the use of Microsoft Office, Word and Excel) | 1 & 3
1 & 3 |
| 20. Good numeracy skills | |
| 21. Strong commitment to excellent customer service | |

OTHER FACTORS

Essential

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| 22. Flexible approach to working hours – working additional hours when required to cover annual leave/sickness | 1 & 3 |
| 23. To undertake training as required | 1 & 3 |

Date prepared: February 2022

Evidence method of criteria

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