



JOB DESCRIPTION

Sales Advisor - Mortgages



Mission Statement

At first union we are committed to offering our customers the highest possible standards of service. In so doing, we are pleased to continue to support the principle of 'Treating Customers Fairly', better known as TCF; and the initiatives being taken by the Financial conduct Authority to further its implementation.

To our customers we are committed to;

- Making customers our Number One priority
- Delivering exceptional customer service
- Treating each customers' needs on an indivial basis
- Offering financial packages that meet our customers circumstances
- Ensuring compliance of the highest standard with the regulatory authorities
- Continuous improvement and innovation in the way we do business

To our staff we are committed to

- Ensuring the welfare of our staff
- Working together to achieve goals
- Listening to staff and valuing feedback
- Creating a challenging, regarding and exciting working environment
- Developing team spirit
- Continuous improvement and innovation in the way we do business



Job Title: Sales Advisor - Mortgages

Remuneration: Competitive

Reporting to: Sales Director

Role specification

- Maximise the leads allocated through to application, by listening and explaining the best options of mortgage/re-mortgage and payment protection; also ensuring Company standards, compliance and money laundering procedures are strictly adhered to
- Achieve Company, team and individual sales targets
- Undertake special projects as required by the business
- Producing land registry and credit searches promptly
- Ensure daily reminders are worked correctly and promptly
- Demonstrate a professional and responsible attitude offering good customer service to our clients
- Understanding and knowledge of our terms of business
- Listening and ensuring our clients expectations are met
- Ensure all quotes and Key Feature Illustrations are sent immediately to clients
- Timescale of cases - completed within one month

Person Specification

- Able to demonstrate Treating Customers Fairly (TCF)
- Participation in regular online Company training
- Ideally hold or be working towards CeMAP 1, 2 & 3
- Ensure regular study of CeMap module material
- Excellent attention to detail and accuracy of notes, documents produced
- Undertake regular training to retain compliant status; and for ongoing development within the Company
- Maintain and keep updated on knowledge of lenders criteria
- Demonstrate initiative, urgency and loyalty to ensure targets are met within the team and individually



