

### Role Profile

**Role Title:** Completions and Processing Apprentice Role

**Department:** Lending Services

**Reports to:** Completions and Processing Manager

**Purpose of Role:** To ensure effective processing of mortgage applications from point of submission through to offer and completion stages, delivering exceptional customer service within SLAs to all parties involved while always putting the customer first. Collaboration with underwriters, legal, brokers, solicitors and other lending services colleagues is crucial to facilitate a seamless broker and customer experience.

The candidate will look to gain good communication skills including on the telephone, accuracy and a strong attention to detail.

#### Key Accountabilities:

- Exceptional attention to detail with data entry and indexing of documents
- Ability to work to set internal policies, procedures and criteria as well as remaining compliant with all applicable regulatory guidelines
- Able to work to agreed objectives and KPIs within service standards
- Proactive and positive communicator, who is naturally organised, enjoys achieving stretching targets
- Telephone call handling, including with Solicitors, Packagers and Brokers
- Able to multi task, across various processes on a daily basis
- Review offered cases through all key stages from COT received to Funds release and completion
- Developing and maintaining key relationships with internal and external business partners
- Assist in managing the pipeline of cases to meet internal SLAs
- Takes ownership for personal development and learning
- Have a good understanding of mortgage underwriting within a regulatory environment and able to help protect the Company from potentially fraudulent activity
- Carry out any tasks or activities required by Management

#### Performance Behaviours:

- Focuses on customer and quality delivery
- Influencing others, organisation and planning
- Organisation and planning
- Team working
- Ethical and compliant behaviour
- Be a role model for our Company values with clear demonstrable behaviour which reflect these daily

#### Essential Skills/Qualifications:

- Minimum of GCSE in English and Mathematics (evidence will be required)
- Attention to detail



- Adaptable and flexible to enable department to deliver exceptional customer service
- Approachable, and able to remain calm when working under pressure
- Dynamic and enthusiastic, with a strong desire to achieve
- Keen to work in a busy, lively environment with the ability to adapt quickly and effectively to change
- Good Team player
- PC literate with knowledge of Microsoft office products and outlook
- Pro-active and alert to making suggestions for process and system improvements
- Honesty and Integrity
- Experience of the Financial Services industry and supporting regulations including Consumer Duty (CD), Treating Customers Fairly (TCF) and Environmental Social and Governance (ESG) is preferred however training will be given where required.

**Our people embrace our values:**

**Fair -** We are open minded and make unbiased, consistent decisions.

**Accountable -** We take ownership of situations so that our customers experience efficiency.

**Customer first -** We understand what our customers want and build strong relationships.

**Transparent -** We communicate clearly and concisely, ensuring that we are open with information.