

Job Title:	Mortgage Administrator	Department:	Mortgages
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Job Description	
PURPOSE OF ROLE	
<p>To provide high quality administration support within the mortgage team, building a relationship with clients whilst delivering a level of service which exceeds expectations. To ensure complete and accurate records are maintained of all client dealings. Ensuring Timothy James & Partners Ltd procedures and compliance standards are met and maintained.</p>	
ROLE AND RESPONSIBILITIES	
<ul style="list-style-type: none"> • Inputting of mortgage applications. • Sending packaging requirements to the lender after application has been submitted. • Creating tasks, records and reminders on Intelligent Office. • Ensuring all documents are scanned to the activity, prior to and post offer. • Creating invoices where applicable. • Adding fees to figures. • Ensuring MI is up to date on relevant spreadsheets. • Sending out of re-broke letters to clients. • Drafting recommendation/suitability letters • Ensuring that files are compliant post completion, i.e. European Standardised Information Sheet (ESIS)/Key Facts Illustration, Fee Agreement, Fact find and suitability letter. • Chasing lenders where required, and providing updates to clients • Updating task notes • Meeting with Lenders' Business Development Managers. • Liaising with solicitors to ensure applications are progressing to exchange/completion and assisting the client in completing any necessary paperwork where applicable. • Liaising with clients, advisers and lenders. • Taking responsibility for product transfer cases/basic research. 	
RISK & COMPLIANCE	
<ul style="list-style-type: none"> • Ensure you are up to date with, and adhere to, Compliance guidance and Business processes relevant to your role. • Complying with the Financial Services and Markets Act 2000, the FCA's Conduct rules now always including Consumer Duty / FCA Statements of Principle & Code of Practice and the relevant rules from the FCA. • Making sure all client contact is carried out in a professional and courteous way. • Making sure all client files are compliant on an ongoing basis. • Making sure all client records are retained in line with the firm's Date security / data protection / record keeping policy. • Provide and communicate consistent products, services and guidance that is right for TJP clients (price, value and following correct advice process) • Focus on the diverse needs of their clients, including those in vulnerable circumstances, at every stage and in each client's lifecycle • Ensure decisions are designed and taken in good faith to ensure the best and fairest outcome for the client and are understood by the client. 	

KNOWLEDGE, SKILLS AND COMPETENCIES

- Experience in a Mortgage Administration role (within the Financial Services sector, a broker firm or IFA would be desirable).
- Studies towards CII/CeMap exams are preferable but not essential.
- Knowledge of Mortgage advice processes and products.
- Good working knowledge of Microsoft Office products including Word, Excel, Outlook and PowerPoint.
- Experience with Intelligent Office is desirable.
- Experience of delivering accurate, relevant and timely information.
- Experience of working with clients.
- Experience of working in an environment of significant change.
- A knowledge of the Later Life Lending Market is desirable.