Mortgage Broker

Are you a dynamic professional comfortable working with high-net-worth clients? We're seeking an engaged and driven Mortgage Broker to join our esteemed team at DPM. For nearly 60 years, DPM has been a trusted provider of customised financial services for doctors, supporting them from early medical education through retirement.

As a Mortgage Broker, you'll play a pivotal role in supporting holistic client relationships, guiding customers through financial milestones in the most simplistic way possible. If you're passionate about helping clients achieve their financial goals and want to contribute to DPM's legacy of excellence, this opportunity is for you. Join us in making a difference in the financial well-being of healthcare professionals.

What's in it for you?

- Flexible working: we support a balanced work style, incorporating a blend of office and work from home
- Additional leave: enjoy five additional paid leave days annually
- State of the art Office Space: a modern, relaxed office centrally located on Castlereagh Street, with a tram stop right outside our door
- Motivating team: be part of a forward thinking and energetic team of consultants and lending support
- Social culture: experience a lively social atmosphere with an engaging calendar of events and activities

Your role will include:

- Delivering comprehensive, high quality and timely service to clients
- Maintaining strong, expert knowledge of the financial market and legal regulations
- Contributing to continuous improvement in service delivery and process improvements
- Maintaining relevant industry training and licensing requirements

The full position description is available at www.dpm.com.au/careers

You will be successful because you have:

- Relevant qualifications
- Experience in a similar position (*18 months minimum*)
- Experience creating new business opportunities and drive for results
- Demonstrated ability to develop and maintain strong business relationships
- Demonstrated ability to develop effective strategies to maximise client outcomes
- Excellent oral, written and presentation skills
- Exceptional attention to detail
- A compliance focus, prior audit results to demonstrate appropriate level of adherence
- Experience using Broker Engine (*preferred*)
- Experience focussed in residential lending, small business banking and asset finance

Interested?

To take the exciting next step in your career with a progressive and supportive company – apply today!
Candidates that wow us will be contacted for an interview immediately!
To be eligible, you must be an Australian Citizen/ Permanent Resident, or have full working rights.

Consultant – Lending

Division:	Lending
Department:	Lending
Manager/ Team Leader:	General Manager – Lending
Position description review:	January 2024

Purpose

The Consultant is responsible for providing a comprehensive, high quality and timely service to clients in their relevant speciality while actively engaging and promoting DPM's 'Financial Peace of Mind' Model.

The Consultant connects internal advice from Accountants and Wealth Consultants into appropriate lending solutions in accordance with both individual lender requirements and industry compliance mandates.

What does success look like for this role?

- Team budgets are achieved
- Referral opportunities are actively sought from other service areas
- Relationships and interactions with clients are undertaken with commitment to high levels of customer service
- Client related work is high quality
- Industry and technical knowledge is current

Responsibilities

Client Focus

- Provide personalized comprehensive, high quality and timely service to clients
- Investigate and develop effective lending strategies according to client needs
- Formulate and present compelling business proposals and presentations clearly articulating the benefits and considerations associated with the application
- Foster and maintain strong client by actively reviewing, developing, and monitoring clients financial situations, providing on-going support and insights.
- Handle client information with the utmost confidentiality and professionalism.
- Meet assigned budget and performance targets
- Ensure client related information is accurate and meets expected DPM record standards
- Keep Consultants/referrers informed about client purchases to facilitate appropriate loan structuring prior to client advice being issued.

Business Development

- Explore opportunities for new business/referral opportunities within the DPM client base
- Collaborate across DPM to build mutually beneficial cross-business referrals
- Promote and market other DPM services to the Lending client base

Technical Expertise

- Understand all areas of legal regulations affecting relevant industry
- Skillfully write Credit Proposals that thoroughly justify and qualify recommendations
- Maintain a deep and up to date understanding of the lending market.
- Monitor/report potential changes within relevant industry that may impact business/clients
- Apply/maintain best practice principles in client service delivery for relevant division

Compliance

- Adhere to relevant industry legislation/governing bodies/ DPM policies/standard processes
- Maintain relevant industry training and licensing requirements

General

- Actively contribute to continuous improvement in service delivery/process improvements
- Collaborate with Consultants across DPM to develop effective referral strategies that align with DPM's 'Financial Peace of Mind' Model
- Coach/mentor/share knowledge with Consultants/colleagues across DPM/relevant division

Qualifications, Skills & Experience

- Relevant tertiary qualifications and substantial experience in a similar position
- Proven experience creating new business opportunities and drive for results
- Ability to work both independently and collaboratively in a team environment
- Demonstrated ability to develop effective strategies to maximise client outcomes
- Demonstrated ability to think and plan strategically
- Excellent oral, written and presentation skills
- Demonstrated ability to work autonomously whilst building/maintaining relationships in a team environment
- Professional demeanour with a strong customer-orientated approach