



DPM has been supporting medical professionals with expert accounting and financial services since 1964. Our Lending team plays a key role in helping clients achieve their goals, and it's all made possible with the help of an amazing support team, and that's where you come in!

We've got a passionate team of Lending Consultants and Associates who are experts in their field. They're backed by fantastic Lending Support team members, and now we're looking for someone new to join the team. You'll be right at the heart of it all, working closely with the team to deliver an exceptional client experience.

This permanent part-time role is perfect for someone with mortgage experience who's ready for a flexible, supportive, and people-focused environment.

What's in it for you?

- Flexible working: part time hours that suit your lifestyle, as well as a mix of working from home & office
- Additional leave: enjoy 5 additional days of paid leave days annually
- State of the art office space: work from our brand new, modern office located on St Kilda Rd, right next to the Anzac Station and tram stop
- Supportive team: be part of a forward-thinking, energetic, and supportive team committed to constant learning and development
- Social culture: fantastic social culture with an exciting calendar of events

Your responsibilities will include:

- Providing an exceptional level of service to a professional client base
- Assisting Lending Consultants with a wide range of administration responsibilities
- Managing client related data so the Lending team are equipped with the most accurate outcomes
- Liaising with clients and finance institutions to get the best outcomes for our client base
- Recognising opportunities to enhance operational processes

The full position description is available on the next page.

You will be successful because you:

- Have worked in a client service or admin role, ideally in banking or finance
- Understand mortgage fulfilment and loan structures – essential!
- Have experience using aggregator software (Broker engine highly desirable)
- Are incredibly organised and detail-oriented individual
- Tech savvy and know your way around the Microsoft Suite
- Are confident working with advanced Excel functions including formulas, pivot tables, and balancing commission reports
- Someone with excellent communication skills & enjoy building positive relationships
- Enjoy helping clients and being part of a team that gets things done

Interested?

If you're looking for a role where you'll feel valued, supported, and part of something meaningful – apply today! We're reviewing applications as they come in, so don't wait!

To be eligible, you must be an Australian Citizen or PR, or have full work rights.

Lending Support

Division:	Lending
Department:	Lending
Manager/ Team Leader:	General Manager – Lending
Position description review:	August 2025

Purpose

The primary responsibility is to support Lending Consultants and Client Services Coordinators with all their client administrative needs.

What does success look like for this role?

- Lending Consultants are adequately supported through the client application process
- Client service is of a high standard and at the forefront of behaviours/actions
- Client related information and data is maintained correctly/accurately
- Relationships with internal and external stakeholders are maintained and well developed
- You will have exceptional written and verbal communication skills in order to convey terms in a clear and concise manner. A polished phone manner and a great attitude are must haves.
- Confidently communicate with an array of stakeholders: lenders, solicitors, real estate agents and, most importantly, the client.
- You are someone who has a great professional presentation and excellent time management skills
- Strong eye for detail; collating documents for home loan applications and manage files from application to settlement.
- Confident to conduct calls to existing or new customers
- Be thorough, precise and take pride in all aspects of your role
- Solid experience and knowledge of residential lending products / policies, serviceability/ basic structure understanding borrower / guarantor /company director /trust.

Responsibilities

Application Management

- Assist Lending Consultants in the following processes:
 - Perform data entry and application management using platforms such as Flex, Broker Engine, and Apply Online
 - Preparing lender application documents, and compliance documentation
 - Assist with managing preliminary lender information / data collection
 - Data entry of application submission into AFG/lender software for credit assessment
 - Arrange, label and upload into Finance system all supporting documents
 - Ensure relevant documentation is compliant with NCCP and DPM service standards
 - Submission of post settlement applications for loan variations such as; loan conversions, re-structures, security substitutions, partial discharges, construction



- loans/progress payments and discharges
- Liaise with solicitors where necessary
- Assist with and meet approval condition from financiers for client applications
- Check funding / prepare settlement letters and diarise for post settlement follow up as necessary
- Commission reporting and balancing, use of excel critical

Client Relationship Support

- Client contact and support comprises of the following:
 - Providing settled loan details and obtaining personal details
 - Scheduling appointments and responding to client enquiries promptly
 - Attend to customer requests for redraws, repayments and any transactional enquiries
 - Contact clients for loan reviews and offer any assistance that maybe required
 - Order online valuations where required and liaise with the valuers where necessary
 - Ensuring clients are regularly informed of progress of submitted application/s
 - Contact on behalf of the Lending Consultant as requested

General Administration

- Maintain relevant reporting/spreadsheets for Lending Consultants. This will include (but not be limited to):
 - Drafting client letters and emails and providing lender/loan information to DPM advisors as requested
 - Monthly business unit performance reports as required
 - Suggest improvements to the dpm process to enhance efficiency and service quality
 - Develop the finance administration systems to ensure streamlined workflow/accuracy/compliance
 - Maintaining excel spreadsheets using formulas and pivot tables – commission report balancing reporting.

Qualifications, Skills & Experience

- Experience working within a lending / bank service orientated organisation
- Demonstrated excellent client service focus
- Excellent time management, organisational and attention to details skills
- Excellent communication skills and demonstrated experience in dealing with clients
- A thorough understanding of the finance / lending process
- Excellent problem solving and analytical skills
- Demonstrated ability to work collaboratively within a team focused environment
- Excellent computer literacy and IT aptitude including Microsoft Office Word, Excel and Outlook
- Demonstrated ability to keep accurate records and produce accurate and timely reports