

Position Title:	Property Finance Advisor		
Division:	Vie Financial Devonport Pty Ltd		
Reports to:	Franchisee Principal		
Number of direct Reports:	0		
Award:	Banking, Finance and Insurance Award [MA000019]		
Delegated Authority Level:	As per Authority Matrix	JD Approval Date:	Sep 2025
Vie Vision Statement:	To revolutionise the finance and insurance industry by setting a new standard of excellence. We aspire to be the most trusted and innovative partner, known for our client-first approach, transparency, and commitment to education and empowerment.		
Purpose and Scope:	As a Property Finance Advisor, you will play a pivotal role in driving sales and business growth. You will work closely with the Branch Principal to build strong, lasting relationships with clients to help them achieve their property goals.		

Job Specification

Key Responsibilities	Major Activities/Deliverables
Safety Health and Environment Management	Adherence to all company health and safety policies and procedures in compliance with the Health and Safety in Employment Act, including taking all responsible steps to ensure your own safety and the safety of others.
Values and Behaviour	- Adherence to our company values of client-centricity, transparency and trust, empowerment through education, continuous innovation, and pioneering excellence. - Adherence to the code of conduct. - Maintain the Company's positive reputation by adhering to standards, expectations, and compliance requirements.
Responsibilities	- Work closely with clients to understand their unique financial needs and provide tailored mortgage solutions. - Complete first interviews and appointments with prospective home buyers to determine suitable lending solutions and submit applications. - Negotiate competitive interest rates and terms with lenders on behalf of clients. - Maintain regular communication with clients, keeping them informed throughout the home loan process.

	• Assisting with loan application processing. • Gathering and verifying necessary financial documents. • Coordinating with lenders, underwriters, and other financial institutions. • Ensuring compliance with industry regulations and guidelines. • Tracking loan applications to actively monitor/manage them from submission through to settlement. • Ensure all information is accurate, identify any missing information and follow up as required. • Providing administrative support to the principal dealer as required. • Use tools to capture customer feedback and take action to correct any service breaks and drive improvement.
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People Specification

Qualification/Licence	• Minimum Qualification Diploma in Finance & Mortgage Broking Management. • Minimum 2 years' experience in banking or mortgage broking (desirable).
Experience	• Competent in Windows 365 (Word, Outlook, Excel). • Strong customer focus and the ability to effectively network to build customer and community connections. • Excellent communication and interpersonal skills, with the ability to build rapport with clients. • The ability to multi-task and be highly adaptable to change and ambiguity • A proactive attitude and the desire to be part of a productive, supportive and collaborative team environment.
Personal Attributes and Competencies	• A willingness to deliver exceptional customer experiences and to help people achieve their home ownership dreams. • Ability to prioritise. • Adaptability and ability to work in a high-pressure environment. • Ability to work unsupervised. • Aligned with company values. • Ability to maintain confidentiality. • Upholds organisational values.
Training	• Attend regular coaching sessions to develop your lending knowledge and skills.

Commitment

I have fully read and understand the job description and:

- I accept and understand my responsibilities listed in this Job Description and agree to carry them out to the best of my ability.
- I accept and understand the potential implications of breaching my responsibilities listed in this Job Description; and
- I accept and understand that there may be times where I will be given reasonable directions that may not be listed in this Job Description and will carry them out to the best of my ability.