



Mortgage and Protection Administrator

Formed in 2014 by our founder Nicola Whateley, Whateley Wealth Management is a leading provider of mass market financial services in the West Midlands, advising on Pensions, Investments, Mortgages, and Insurance.

We firmly believe that everyone deserves a secure financial future and have structured our business to deliver this. Our mission is to make the complex simple, giving our clients peace of mind.

We are a dynamic and forward-thinking business and have grown rapidly since our launch. We are active in the local community and still hold dear to our family values; regarding staff and clients as family and treating everyone with integrity and respect.

We now have an exciting opportunity for a Mortgage and Protection Administrator to join our team and help us continue to deliver on our mission and make a difference to our clients.

We are an equal opportunities employer believing passionately in the benefits of diversity in our workforce. We are committed to treat all candidates fairly, regardless of Ethnicity, Age, Gender, Sexuality, or Disability.

This is an outstanding opportunity to train within a varied position covering many different aspects of administration and technical duties within the company, supporting advisers to deliver the best service to our clients.

Tasks and Responsibilities:

- Dealing with day-to-day client and lender enquiries.
- Preparing for client meetings including suitability reports, appropriate literature and presentation documents.
- Preparing and submitting applications and supporting documents to product lenders.
- Inputting new business proposals to the back-office system in line with Company procedures, ensuring data is updated in full to ensure correct MI reporting.
- Taking ownership of the case until completion which involves liaising with clients, lenders, solicitors, and other professional bodies.

The ideal candidate for the role is an individual who is:

- Self-motivated
- Highly organised
- Client focused
- Professional
- Strong interpersonal skills
- Pro-active and has a positive nature, combined with excellent all round communication skills, and a good telephone manner.



- Focused and have thoroughness in accomplishing a task, displaying high levels of accuracy and attention to detail.
- Ability to multitask and meeting deadlines
- Accuracy and attention to detail
- Teamwork
- Eager to enjoy work within a high achieving and committed team.
- Discrete and highly protective of our client's confidential personal data.
- Minimum 12 months administration experience in a similar role

Job Types: Full-time, Permanent, Apprenticeship

Salary: £23,000-£25,000 per annum (dependent on experience and qualifications) plus bonus scheme

Benefits:

- Company pension
- Private medical insurance (following probation period)
- Cash plan (following probation period)
- Exam support

Schedule:

- 8-hour shift (37.5 hours per week)
- Monday to Friday
- No weekends

Work Location: Office based in Cofton Hackett (B45)

To apply for this role, please send your CV to our Office Manager, Kelly Shephard, at kelly@whateleywm.co.uk .