



Example of Loan Consultant Job Description

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Our company is hiring for a loan consultant. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for loan consultant

- Successfully communicate & collaborate with fellow Loan Consultants assigned to your team who assist in loan origination
- Ensure each customer receives the treatment and an experience that exudes Clearlane's core values
- Assist in coaching Loan Consultants within your immediate team and be a part of their development process
- Executes against published Pulte process model with regard to communication standards, cycle times, partnering with Pulte Homes and other departments
- Take incoming and outgoing phone calls while ensuring regulatory compliance and maintain a high standard of influence and persuasion to get a client through to the closing process
- Use a variety of outreach methods to communicate with clients such as phone (inbound and outbound calls), emails, text and chat
- Assist with addressing operational questions and concerns
- Proactively reach out to clients and client prospects who are looking to obtain a personal loan and guide them through the loan review process
- Spends a minimum of 50% of working hours outside the office to conduct sales calls to create, develop and maintain referral relationships with real estate professionals, builders, and consumers
- Analyzes potential marketing opportunities to develop future business opportunities

Qualifications for loan consultant

- The ability to travel a up to 50% of the time, this may include weekend and holidays
- Highly motivated to execute on deliverables on time
- Subject Matter Expertise in
- Bachelors Degree in Computer Science or related technical field experience
OR a High School diploma and at least 5 years of professional work
experience
- Experience with fixed income analysis and portfolio management
- Strong computer skills preferred, including Microsoft Office suite