JOB DESCRIPTION TEMPLATE

Mortgage Broker Assistant

Support an Australian mortgage broking team with accurate client records, document collection and timely file updates from enquiry through settlement.

Organisation	[Organisation name]
Location & work model	[Location; onsite, hybrid or remote]
Employment type & hours	[Employment type, weekly hours and time-zone overlap]
Remuneration	[Confirmed pay range, currency, superannuation and any incentive terms]
Reports to	[Named manager; suggested position: Mortgage broker or broker support team leader]
Systems & access	[Approved systems, records and access scope]
Authority & supervision	[Permitted tasks, decisions, reviewer and escalation route]
Required qualifications	[Employer-confirmed licences, registrations, training or accreditations]

About the organisation

[Describe the actual business, team and customers in two or three factual sentences.]

Key responsibilities

- Maintain client and loan records in the brokerage CRM.
- Request and organise outstanding documents against the broker’s checklist.
- Prepare meeting notes, task lists and status updates for the broker.
- Track file milestones and flag missing information or approaching deadlines.
- Prepare a daily exception list with a named owner and next action for each item.
- Keep appointment, document-request and handoff templates current under the team's approval process.

Capabilities & first 90 days

Essential capabilities

- Experience in Australian mortgage administration or a similar financial services support role.
- Strong written communication, accuracy and discretion with client information.
- Ability to follow documented processes and escalate exceptions promptly.

Useful experience

Broker CRM | Document management | Microsoft 365 | Client communication

Keep these desirable rather than essential unless the work requires them on day one.

Working relationships

Brokers, processors and the client service team. Confirm the actual owners and handoff routes.

First 90 days

Agree the pace, reviewer and measures with the person you hire.

30 days

Learn the intake checklist and keep a supervised enquiry queue current.

60 days

Own agreed administrative tasks with traceable updates and timely escalation.

90 days

Review queue age and recurring missing inputs with the broker and improve one handoff.

How to apply

[Application route, closing date, contact and any adjustment request process.]

We assess candidates against the role-relevant criteria and use a fictional work sample.

Hiring guide

For the hiring team. Remove this page from the public advertisement.

Interview prompts

1. A client asks you which lender to choose while you are collecting documents. How do you respond and record the handoff?

2. Describe a relevant piece of work, the checks you used and what you did when the instructions or evidence were incomplete.

3. How would you organise competing deadlines, record your decisions and escalate a risk to the next handoff?

A practical work sample

Using a fictional enquiry inbox, prioritise five follow-ups, identify missing intake information and write an approved appointment message. Explain which questions you would refer to the broker.

Use fictional information and the same instructions for shortlisted applicants. Agree adjustments and timing beforehand. Score accuracy, reasoning, communication and appropriate escalation; this exercise should not produce live client work.

Before posting

- Replace every bracketed field with the actual employer, working arrangement and pay terms.
- Choose the duties the role will really own; remove unrelated tasks and separate essential from trainable skills.
- Confirm the task authority, supervision, qualifications and access with the responsible employer or licensee.
- Check pay and conditions against the applicable employment requirements before advertising.
- Use the same role-relevant selection criteria and fictional work sample for shortlisted applicants; invite adjustment requests.
- Name the reviewer and agree realistic first-90-day outcomes before the person starts.

Employer reference points

ASIC: Credit authority and appointment

Fair Work Ombudsman: Pay and advertised conditions

Fair Work Ombudsman: A clear hiring process

OAIC: Information and access

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