JOB DESCRIPTION TEMPLATE

Commercial Lending Support Specialist

Support commercial property and business lending files with document coordination, financial information checks and lender submission administration.

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: Commercial finance broker or lending operations manager]
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

- Gather company, guarantor, security and financial documents against deal checklists.
- Prepare factual file summaries and application packs for the broker or banker.
- Track lender due diligence requests, conditions and key dates.
- Escalate credit structure, pricing and legal questions to the deal owner.
- Track entity, guarantor and security-document requirements against the agreed scope.
- Keep financial information and outstanding lender requests linked to their supplied sources.

Capabilities & first 90 days

Essential capabilities

- Experience supporting Australian commercial or business lending transactions.
- Comfort reading financial statements and corporate documents.
- Strong confidentiality, organisation and stakeholder follow-up.

Useful experience

Commercial lending documentation | Financial statements | Security checklists | Lender portals

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

Working relationships

Commercial brokers, business clients, accountants and lender operations. 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 entity and financial-document checklist for assigned commercial products.

60 days

Maintain accurate file packs and outstanding-request schedules for broker review.

90 days

Identify repeat missing inputs and improve the commercial file 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. How would you organise a file with multiple entities, securities and guarantors without losing track of outstanding information?

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

Create an entity and document matrix for a fictional business lending pack. List missing inputs, source references and questions for the authorised broker or assessor.

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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