JOB DESCRIPTION TEMPLATE

Mortgage Settlement Coordinator

Coordinate the administrative steps between formal approval and settlement, keeping dates, conditions and stakeholders aligned.

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: Settlement team leader or brokerage 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

- Track formal approval conditions and outstanding settlement documents.
- Coordinate factual updates with lenders, brokers, clients and settlement contacts.
- Maintain a clear settlement checklist and critical dates.
- Confirm completion and hand the file to the post-settlement team.
- Keep confirmed dates separate from requested or provisional settlement times.
- Record last-minute changes and route payment-detail concerns through approved verification procedures.

Capabilities & first 90 days

Essential capabilities

- Experience with Australian mortgage settlement workflows.
- Strong task coordination and comfort working to fixed deadlines.
- Accurate document handling and timely escalation of exceptions.

Useful experience

Settlement checklists | Lender portals | Stakeholder liaison | Workflow management

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

Working relationships

Brokers, lenders, conveyancing contacts and clients. Confirm the actual owners and handoff routes.

First 90 days

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

30 days

Learn milestone tracking and approved external communication channels.

60 days

Maintain an accurate settlement diary and communicate verified readiness updates.

90 days

Review delayed settlements and improve one recurring coordination 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 settlement date changes and two parties have different readiness information. How do you reconcile and communicate the update?

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

Prepare a settlement action schedule from a fictional diary with unresolved conditions and conflicting dates. Identify the sources to confirm before communicating readiness.

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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