

<b>JOB TITLE</b>	<b>Broker Support Administrator (Distribution)</b>
<b>REPORTS TO</b>	<b>Product Manager</b>
<b>DATE COMPILED</b>	<b>December 2024</b>

## **JOB DESCRIPTION**

### **CORE VALUES AND INDIVIDUAL CONDUCT RULES**

Our five core values define what we're all about and what makes us tick. We're always looking to appoint brilliant people, who share them!

- ✓ **Make a lasting impression** – leave people better than you found them
- ✓ **Proud of our past and excited by our future** – make sustainable decisions that last for generations
- ✓ **Passionate about people** – be warm, straight talking and genuine
- ✓ **Work together** – be a team player, celebrate success, be supportive and give your all
- ✓ **Deliver on promises** – if we say we'll do it, we will

As a Financial Services organisation, we expect all of our colleagues to adhere to the individual conduct rules outlined below:

- You must act with integrity
- You must act with due skill, care and diligence
- You must be open and cooperative with the FCA, the PRA and other regulators
- You must pay due regard to the interests of customers and treat them fairly
- You must observe proper standards of market conduct
- You must act to deliver good customer outcomes for retail customers

### **1 MAIN PURPOSE OF JOB:**

To promote the Society to the intermediary community, raising awareness of Marsden Building Society products, criteria, and service. To increase levels of new mortgage business being introduced to the Society whilst helping to guide the intermediary through the complexities of the mortgage application process. To build and maintain strong relationships with all firms to encourage new and repeat business.

Understanding the complex legislation around mortgage regulation MCOB and MCD and apply this to day-to-day activities.

### **2 DUTIES & KEY RESPONSIBILITIES**

- **"First touch" intermediary call handling**
  - Be the first point of contact for all telephone broker new business enquiries, ensuring to incorporate the Seven Principles of Skilful conversations.
  - Manage the Society's "live chat" to respond to new business enquiries
  - Respond to broker enquiries, provide initial lending decision based on CRMP and encourage AIP service.
  - Refer any unusual/complex cases which you are happy to recommend (using referral template).
  - Introducing 'Our Services' to brokers, understanding if brokers specialise in our lending areas and refer to BDAs where appropriate.
  - Onboard brokers into email broadcast.
  - Business volumes permitting make outbound calls to increase business volumes.
  - Provide product and market insights to Product Manager including common enquiries or AIP decline reasons.
- **Administration Support**
  - Carry out AIP's by utilising your CRMP knowledge and communicate your decision to the broker, ensuring adhering to published SLA's.
  - Completing chase up of accepted AIPs, offering support and assistance where required.
  - Manage Intermediary mail responding to queries within published SLA's. Utilising all opportunities and referring to NSLA matrix
  - Reconcile and pay procurement and marketing fees in the absence of the Product Manager.
  - Process all broker ESIS illustration requests within SLAs.
- **Respond to and meet with regulatory requirements**
  - Understand and interpret FCA, PRA, MCOB and MCD requirements in relation to mortgage enquiries. Keep up to date with changes to CRMP and Society policies.

### 3 STANDARD EXPECTATIONS

All postholders across the Society are expected to adhere to the following expectations:

- Confidentiality - working within the Society the post holder may gain knowledge of confidential matters, such information must be regarded as strictly confidential and not disclosed further. Failure to observe this confidentiality clause could result in disciplinary action
- Codes of Conduct and Accountability - the post holder is expected to comply with FCA and PRA requirements, with specific reference to Senior Management and Certification regime (SMCR) and conduct rules for all staff.
- Health and Safety and Security - all employees have a duty for their own and others safety and to report any accidents, complaints or untoward incidents as per Marsden procedure.
- Valuing Diversity and Promoting Equality - as an equal opportunities employer all staff are required to comply with relevant policies and procedures.
- Training - staff have a duty to complete all required continuous professional development and training.
- Vulnerable Customers - to contribute to the safety of our customers who require additional support by identifying where a need exists and taking the appropriate steps to ensure any barriers are removed when dealing with their enquiry and appropriate monitoring of both the account and the customers circumstances takes place periodically to ensure fair customer outcomes. Branch/Department Champions provide advice and support to colleagues to assist them in meeting their responsibilities in contributing to the safeguarding of our customer.

The range of duties and responsibilities outlined in this job description are indicative only and intended as a board guideline of the range and type. They are subject to modification in the light of changing demands and development requirements of the post holder.

### PERSON SPECIFICATION

Factors	Essential	Desirable
Education & Qualifications	<ul style="list-style-type: none"> <li>• GCSE Maths and English (Grade A – C) OR relevant experience in Financial Services</li> </ul>	<ul style="list-style-type: none"> <li>• To begin studying or already working towards CeMAP qualification</li> </ul>
Knowledge, Skills & Abilities	<ul style="list-style-type: none"> <li>• Previous experience of working in a customer service environment</li> <li>• Excellent oral and written communication skills.</li> <li>• Computer literate, ability to use Microsoft Office.</li> <li>• Ability to work under pressure and prioritise work.</li> <li>• Approachable and confident when dealing with individuals at all levels.</li> <li>• Work effectively in a complex and changing environment.</li> <li>• To work to the highest standards of accuracy and attention to detail in the carrying out all tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• An understanding of MCOB, MCD, PRA, FCA, GDPR, Money Laundering + Data Security</li> </ul>