

Job Profile - Finance Consultant

Summary

Reports to: John Mitchell (Managing Director)

Purpose of Job

To assist clients to purchase, expand or re-finance their business(es) by arranging commercial mortgages, whilst treating clients fairly at all times.

Main Duties

- To maintain up to date market knowledge to enable the identification of appropriate solutions for customers
- To source and present debt facilities to clients
- To work to fulfil both the Christie Finance, and individual, business development plan
- To generate business from the Christie & Co database of registered business purchasers and existing operators
- To create close working relationships with Christie & Co colleagues to maximise referral opportunities and reciprocal business
- To maintain ongoing contact with prospective clients (both internal and external) to ensure Christie Finance is foremost in their minds for any business finance opportunity
- To prepare and submit quality applications for finance on behalf of clients
- To identify and develop relationships with active lending institutions
- To plan, manage and execute several ongoing assignments at any one time whilst ensuring that tight deadlines are met
- To operate in line with FCA Guidelines
- To maintain professional expertise through course attendance, reading of financial journals, and further training in line with but not limited to CF CPD requirements
- To understand what Treating Customers Fairly means in relation to Christie Finance and embed this fully within the work

General Responsibilities

- To present and promote Christie Finance as a professional organisation with the highest standards of excellence and client care
- To contribute to the development of Christie Finance's corporate image and perception as a whole by demonstrating quality, consistency and reliability
- To comply with company policies regarding Equal opportunities, Health and safety, Data protection and Environmental impact
- To fulfil any other duties as may be reasonably expected

Working Relationships & Contacts

- Clients - Purchasers and Operators
- Bank representatives
- Christie Finance colleagues
- Christie & Co employees
- Christie Group employees

Person Specification

- Able to develop strong reciprocal working relationships
- Sales and service orientation
- Detail conscious
- Analytical
- Self-motivated
- Driven and energetic
- Determined and resilient
- Honest and trustworthy
- Critical thinking and problem solving
- Organised and planned
- Calm considered approach when handling diverse demands
- A team player
- Interpersonal skills
- Communication skills - listens carefully and gives feedback

Experience & Qualifications

- 2 years+ professional experience in sales, possibly within property or finance
- Degree level education or equivalent
- Excellent English writing and presentation skills
- Computer literacy - MS Word, Excel and PowerPoint
- Industry Awareness - regulations (TCF, money laundering, FCA etc.)