

Lending Associate

Partners Wealth Group Melbourne

At Partners Wealth Group (PWG), we are proud of our dynamic culture. We have and will continue to invest a lot in our people, systems and facilities and have seen exciting growth in all areas to make us one of Australia's leading providers of business and financial advisory services for high-net-worth individuals, business owners and organisations.

Part-time and flexible working options available.

Why do we exist?

We exist to help clients, partners and our people to unlock a world of possibilities to surpass their financial and lifestyle goals. We have experienced impressive growth over the last few years, through our unique positioning in being able to provide clients and referral partners with a seamless broad-based service offering which meets their financial and business needs – whether it be a financial advice, superannuation, legal, estate planning or lending matters. We are always interested in passionate professionals keen to make a difference in their clients' lives.

About the role

As a Lending Associate at PWG, you will play an integral role in the support of our Lending Advisors and be exposed to almost the entire brokering process. Lending Associates have a core focus on customer care and relationship management. These are essential functions for embodying the core values of the Lending team, which includes maximising customer satisfaction. This outcome is essential to the wider PWG business model, as the vast majority of clients come from referrals within the company. This attitude has resulted in high customer retention, so if you're someone who loves relationship management and is detail orientated while working at pace, you'll be a great fit.

As a Lending Associate, you will be a primary interface between the clients and financiers once the optimal loan structure has been determined by our Lending Advisors and agreed with by the client. This role involves assisting the client through to the settlement of their loan application. You will be responsible for managing ongoing client relationships from the pre-approval stage, by identifying individual client needs and servicing those needs in a manner which ensures value to the client.

About you

As a Lending Associate, you will thrive in this environment by demonstrating:

- The ability to assist with the management of the client relationship.
- A highly organised approach and ability to manage your time.
- Excellent communication skills including ability to modify approach to suit various audiences.
- Expertise in analysing and producing supporting financial and loan documentation.
- The ability to network effectively with clients and maintain professional working relationships.
- The ability to implement project and action plans and juggle workload commitments.

Our ideal candidate:

- Has a business-related degree. The role would suit someone completing a finance/accounting degree, or someone with a banking background.
- Will need excellent relationship management and administrative skills.
- Thinks outside the box and constantly looks for better ways of doing things.
- Will need great energy and be highly motivated to achieve growth and meet deadlines.

Our culture

Partners Wealth Group has:

- A fast-paced and client-focused business.
- Accelerated training & development.
- A genuine and friendly team environment.
- A great office space.
- A fantastic social network.

Why wait? Apply now and launch your Lending career at Partners Wealth Group!

If you have any questions, please do not hesitate to contact James Thompson, General Manager, Lending, JThompson@pwg.com.au.

Please note, only shortlisted applicants will be contacted.