

Lending Coordinator

Our Massive Transformational Purpose

Unleash our unparalleled customer care for community good

Our Values

People first: We put you at the center of everything we do

One team: We're stronger together

Innovation: We find a better way

Integrity: We do right by you

Keep it simple: We like things straight forward

Lending Coordinator

Working at TSB

Our people are proud to belong to a 100% independent NZ owned Bank and proud to see the results of their efforts invested back into New Zealand.

We're a leader in customer service, having won the 2019 Consumer NZ People's Choice Award for Banking four years in a row and the 2019 KPMG New Zealand Customer Experience Excellence Award.

Our focus to deliver good customer outcomes is in our people's DNA and TSB is so committed to it, it's a core part of our purpose: Unleash our unparalleled customer care for community good.

Our strong corporate values: One Team, People First, Integrity, Innovation, Keep it Simple set our standards and set us apart. We demonstrate our People First value through the distribution of our profit for the benefit of others and by providing our employees with a place to belong, grow, and be recognised.

We work together as a One Team community to ensure a sustainable future and we encourage every employee to have a voice and be an active participant in our success. We aim to create remarkable experiences for our people just as our people create remarkable experiences for our customers.

Role dimensions

Reports to:	Team Leader, Lending Centre of Excellence
Department:	Customer Solutions and Service
Job Family:	Technical Specialist
Location:	New Plymouth
Direct Reports:	N/A
Total Employees:	N/A
Financial Authority:	No

Role requirements

Primary purpose

The primary purpose of the role is to provide consultant and administration support to Lending Specialists and the Banks customers.

To assist in managing the lending process post loan approval and ensuring the ongoing retention of clients through superior customer service. This role will also assist and support the Lending Centre of Excellence team achieve its overall objectives.

Role specific areas of responsibility

- Identify opportunities for process improvement and participate in projects as required.
- Triage Leads including pre-qualification.
- Assist clients in establishing new accounts, including fulfilling all on-boarding requirements.
- To actively assist & monitor retention of existing business and fixed rate loan rollovers.
- The Lending Centre of Excellence objectives are actively pursued at all times. The additional Bank services are promoted whenever possible. To ensure referrals are made where possible, to other divisions of the Bank.
- Meet and maintain accuracy, efficiency and completion rates whilst ensuring high quality output.
- Achieve audit and compliance objectives with corporate policies and procedures, as well as complying with industry code of practice and legislative requirements (e.g. AML).
- Issue request emails to customers/clients for Individual and Entity compliance information.
- Manage any event organisation requirements in conjunction with other staff.
- Attend to draw down responsibilities.
- Conduit between Lending Centre of Excellence and Branch Network (for handovers).

Generic responsibilities

- Keep up to date with and comply with all Bank policy and procedures.
- Comply with all health and safety policies, directions and instructions and ensure that in the performance of duties not to undermine own health and safety or the health and safety of any other person. Be continually mindful of the Bank's Health and Safety Policy:
 - No business objective will take priority over health and safety.
 - All incidents are preventable.
 - Whilst management have ultimate accountability, we all have responsibility for health, safety and wellness.
 - All employees have the responsibility to stop any job they believe is unsafe or cannot be continued in a safe manner.
- At all times demonstrate the Bank's values:
- Embrace change and act as a change agent – accepting, embedding and reinforcing change in the workplace.

Person specification

Required experience & qualifications

Qualifications

Essential:

- N/A

Experience

Essential:

- 2 + years' experience in the banking industry
- Banking experience in onboarding, AML and loan documentation and processes.
- Demonstrated retail banking acumen and an understanding of loan processes.
- Ability to interact and develop relationships with clients.
- Have excellent communication skills – you will be relied on to coordinate and communicate key actions and messages to various stakeholders.
- A polished and professional approach to all communications, including excellent grammar and spelling.
- An approachable friendly attitude, capable of collaboration across all levels of the organization.

From time to time there may be additional activity not contained within this position description that the appointee is to complete in the interests of the appointment and their own personal development.

This position description provides a broad overview of responsibilities. The position description is a living document and the Bank reserves the right to amend from time to time as required.