

JOB DESCRIPTION

Mortgage Planning Consultant

Is this role for you?

The first thing you'll love about working with us is the sense of satisfaction when our happy clients leave glowing reviews about their experience. The thank-you cards and gifts are just an added bonus!

As a Mortgage Planning Consultant, you'll play a key role in helping our brokers structure the perfect mortgage solutions for our clients, ensuring they receive the best experience possible. Your high standards, attention to detail, and positive attitude will always be valued and rewarded.

You thrive in a team-oriented environment, enjoy working with systems, and have excellent communication skills. Most importantly, you love working alongside like-minded professionals who care as much as you do. Precision, efficiency, and outstanding customer service are important to you, and you take pride in getting things done at the right pace.

Who are we?

For over 25 years, we've been helping people achieve their homeownership dreams—and they love us for it. Our commitment to high standards and going the extra mile has driven our success. (Don't just take our word for it—check out our 5-star Google reviews!)

We know how important it is to enjoy your work, and that's why we foster a supportive, close-knit team environment. Right now, we're a small but dynamic team of five, with exciting plans to grow to a team of 10+ in the coming years.

The Role

Joining an amazing team of mortgage and protection consultants, you'll work closely with our brokers to:

- ☒ Analyse clients' financial situations
- ☒ Structure and present mortgage solutions
- ☒ Ensure compliance with lending regulations

This role is vital in streamlining the mortgage application process, liaising with brokers, lenders, and clients to ensure everything runs smoothly. You'll be responsible for processing mortgage applications, keeping clients updated, and delivering the exceptional customer service that we're known for.

Additionally, you'll support the team with:

- Managing office systems and processes
- Helping brokers meet compliance requirements
- Providing clients with regular updates

Key Responsibilities

- Assess clients' financial situations, income, and credit history to determine mortgage eligibility
- Source appropriate mortgage products to meet client needs, and assisting the broker with the client recommendation.
- Review documents (e.g., payslips, tax returns, company accounts, bank statements) to verify income and outgoings
- Prepare and submit mortgage applications, ensuring they progress smoothly
- Guide clients through the mortgage process with regular updates
- Prepare tailored protection solutions based on broker recommendations and client needs
- Produce recommendation reports detailing brokers' advice
- Handle incoming emails and telephone queries
- Liaise with clients, lenders, solicitors, and estate agents to keep all parties informed
- Manage workload effectively, ensuring deadlines are met

Working Hours –

🕒 Monday to Friday, 9:00 am – 5:00 pm

Benefits

💰 competitive Basic Salary of £26,000 – £30,000 (depending on experience)

✦ Benefits include:

- Pension plan (automatic enrolment)
- Private Medical Insurance (cover available for family members)
- Ongoing training & personal development opportunities
- Regular team days out & quarterly training sessions
- Team-building events
- Extra day off for your birthday 🎂

Location

📍 Crowthorne office, with the option to work from home one day per week. Our office is conveniently located next to Crowthorne train station with free onsite parking.

Is it you?

If this sounds like the perfect role for you, we'd love to hear from you!

✉ Email Dave at: dave@motion-mortgages.co.uk