

## ROLE STATEMENT

<b>TITLE:</b>	Finance Manager
<b>LOCATIONS AVAILABLE:</b>	Mt Gravatt and Beenleigh
<b>THIS ROLE REPORTS TO:</b>	Director – Business Development
<b>ABOUT OUR BUSINESS:</b>	Tier 2 Accounting Firm in the top 30 nationally Parent company in operation over 20 years 4 offices with 3 Partners / office >2500 quality business clients spread across the group

### **PRIMARY OBJECTIVES:**

1. To convert quote opportunities into applications and subsequent approvals and settlements
2. To achieve targeted commission sales margins
3. Build and maintain relationships with key group personnel, our business clients and panel lenders
4. Recognize and initiate cross referral opportunities for other group divisions

### **Responsibilities:**

1. Provide professional and courteous service to all parties related to all transactions at all times
2. Convert quote opportunities from internal referrals and marketing campaigns into applications
3. Structure, submit and negotiate approvals for Chattel Finance applications with our Panel Lenders
4. Obtain all necessary information from applicants as required
5. Identify and implement credit approval limits for appropriate clients
6. Manage and undertake execution of loan documents as required
7. Recognize and initiate cross referral opportunities for other group divisions

### **KEY CHALLENGES:**

1. Developing and maintaining relationships with key group personnel and our business clients
2. Converting quote opportunities to applications in the face of external competition
3. Ensuring a high quality standard of all Credit Applications submitted to Panel Lenders
4. Maintaining an intimate knowledge of the strategies, policies and products of each Panel Lender
5. Keeping abreast of general industry developments

### **KEY RELATIONSHIPS:**

- Managing Director
- Director Business Development
- Other Group Finance Managers
- Finance Managers Assistant (shared resource)
- Partners, Managers and Accountants of our parent entity and its related divisions
- Group clients
- Managerial and credit assessment staff of Panel Lenders

### **ESSENTIAL QUALIFICATIONS/EXPERIENCE:**

- A minimum of 5 years experience in the finance industry with direct exposure to motor and/or equipment finance (experience in selling/arranging property finance would be an advantage)
- A minimum of 2 years direct selling experience in the finance industry
- Sound working knowledge of the 'end to end' process for Chattel, Business and Mortgage lending
- A proven ability to structure transactions based on individual circumstances
- Sound understanding of and an ability to interpret financial statements for a diverse customer base

**PERSONAL CHARACTERISTICS:**

- Driven to succeed
- Strong written and verbal communication/negotiation skills
- Strong interpersonal skills
- Effective planning and organisational skills
- Undoubted integrity
- Self-motivated
- Attention to detail