

Job Description

Position	Loan/Lender Admin Assistant
Reporting to	Client Services Manager
Location	Hastings
Salary	£Competitive

Summary of the position

Invest & Fund is an alternative finance provider committed to building the UK's most trusted peer-to-peer marketplace helping individuals, high net worth lenders, private banks, family offices and institutions achieve attractive, risk-adjusted returns from successful residential development projects. Having already lent over £70m, the business is at an exciting time as it seeks to scale and become a market leader in the provision of development and bridging finance to professional property developers. Invest & Fund is fully authorised and regulated by the FCA.

Throughout the life of a loan, from initial enquiry through to full repayment, all the relevant information and documentation needs to be gathered, reviewed, administered and appropriately stored and recorded. The main function of this position is to assist in administering, maintaining and progressing all our property loan files and enquiries through the initial stages, proactively chasing for information and updates as appropriate. In addition, the successful candidate will assist in administering and maintaining our existing lenders and progressing all new lender enquiries. Full training will be provided.

The successful candidate will require to exhibit an ambition to succeed and a desire to build a career in the fast-paced P2P industry. They must be able to demonstrate an enthusiasm for teamwork and be willing, cheerful, well presented and punctual at all times.

Key Responsibilities

- Supporting regionally based Business Development Managers (BDM's) to minimise their involvement in administrative matters
- Regular and prompt communication with the BDM's
- Liaise with Client Service Manager regarding new applications that require clarification/action. These will need to be followed up/recorded and senior colleagues kept advised
- Apply due Diligence on any applications as required
- Chasing up/pursuing all relevant answers to all questions re due diligence information
- Interaction with quantity surveyors, valuers, solicitors and any other third-party providers
- Maintain internal records (including pipeline reports, credit decisions and lender capacity)
- Dealing with inbound correspondence associated with both new loan applications and existing loans progressing through the business (including email, phone and letters)
- Data capture at relative stage of deals for reporting purposes
- Own and upkeep team diary, with daily advices to Client Service Managers on wider team
- Monitoring new lenders signing up via the website/satisfying AML requirements
- Daily Equifax monitoring checks
- Assist in managing third party service level agreements
- Assist in maintaining the register of third-party service providers associated including ongoing due

diligence

- Drafting of Indicative Term sheets for specific loans
- Preparing emails and communications to update lenders regarding loans using Mailchimp software
- Maintaining internal management information reports
- Processing lender deposits/ withdrawals
- Assist in maintaining the professional client register
- Assist in setting up and populating Data Rooms for corporate clients
- Other reasonable duties and responsibilities in line with the role and business requirements

Key Skills

- Always seeks to provide a high quality and efficient, accurate and polite service to clients
- Good communication skills, written and verbal with the ability to clearly articulate requests and instructions to an appropriate level
- Assist in planning and prioritising workload following detailed internal policy and procedure
- Assist in drafting/ amending loan documentation as instructed by legal, credit and compliance
- Solid IT skills, using Microsoft Office Word, & Excel
- An understanding of Alternative Finance and On-line platforms – **desirable but not essential**
- Flexible and adaptable in approach
- Positive 'can do' attitude
- Ability to work as part of a team or individually using your own initiative to meet tight deadlines
- Collaborative team player who is willing to learn and support
- Strong attention to detail
- Always maintain professional behaviour and work acceptable attire
- Able to demonstrate ambition to succeed in a team environment and display a willingness to get on with all team colleagues from a variety of backgrounds and professional levels
- Must be able to multi-task
- Must be numerate

Key Experience

- Good knowledge and experience of Microsoft Applications
- Able to follow and implement a clearly documented process
- Ability to follow instructions, both verbal and written
- Awareness of AML and KYC
- Read, understand and put into practice the company's policies and procedures