

POSITION DESCRIPTION

POSITION TITLE: Account Executive

GRADE: tbd

REPORTS TO: Branch/Sales Manager

FLSA: Exempt/Commission

POSITION OVERVIEW: An Account Executive will be required to develop, train, maintain, and nurture all associate accounts in their territory in order to increase market share and maintain relationships (**requires 70% of time devoted to this area**). This position will require appropriate public speaking skills and sales skills

ESSENTIAL DUTIES and RESPONSIBILITIES, *includes the following responsibilities, but not limited to:*

- ◆ Identify, develop and maintain broker relationships with “A” paper/FHA brokers.
- ◆ Presents Reunion Mortgage loan process to brokers with the intent of establishing business flow.
- ◆ Trains brokers on Reunion Mortgage website, secondary policies, guidelines, company policies etc.
- ◆ Utilizes marketing material, approved by corporate to establish company branding, and informs broker of marketing communication that will follow via email.
- ◆ Handle all aspects of broker relationships.
- ◆ Coordinate customer service between brokers and staff but empowers broker to be self sufficient utilizing company process.
- ◆ Maintains regular communication with the broker(s) and informs brokers of changes and enhancements in processes and procedures.
- ◆ Compliance with company guidelines regarding call reports, volume projections and any other projects
- ◆ Enforce company policies with brokers.
- ◆ Meet monthly/yearly production levels as determined by the company.
- ◆ Monitors expiring rate locks for customer base.
- ◆ Monitors pull through reports for assigned customer base and provides continual coaching for acceptable performance.
- ◆ Develops marketing ideas and plan for continued increase in volume for assigned territory.
- ◆ Provide a professional, well polished image of the company to brokers.
- ◆ Complete ongoing sales training, seminars and trade show attendance.

SUPERVISORY RESPONSIBILITIES:

Direct Reports: N/A

PHYSICAL and ENVIRONMENTAL CONDITIONS

Valid Driver’s license and appropriate levels of auto insurance required. Access to an automobile to regularly visit customer accounts is required for 70% of working time. Employee must be able to travel if servicing a large geographic territory. Standard office equipment and tasks, including work at a computer terminal. The position requires partial sitting and walking throughout the day.

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PREFERRED QUALIFICATIONS AND EXPERIENCE

- ◆ Two (2) to five (5) years wholesale mortgage banking experience
- ◆ Must possess good presentation skills, both formal and informal. Experience with presentation software such as PowerPoint preferred
- ◆ Must possess excellent problem-solving and interpersonal skills
- ◆ Excellent verbal and written communication skills
- ◆ Solid organizational skills
- ◆ Ability to work independently in a fast-paced environment
- ◆ Intermediate experience with Microsoft suite of products
- ◆ Excellent Internal and External Customer Service
- ◆ Resourceful
- ◆ Be able to work as part of a team
- ◆ High level of integrity
- ◆ Adapts well to change
- ◆ Self starter