



Introduction to the Loan Officer Assistant

The Wald Group, of Primary Residential Mortgage is looking for a responsible individual who can come aboard to assist with the day to day management of the team. The group is based out of the Canton office of Primary Residential mortgage, INC. We are consistently one of the top producing mortgage teams for Primary Residential Mortgage, closing 40 million dollars in business last year. We are looking to double our business and are in need of someone who will be self-motivated and organized, with excellent time management skills to help the team increase their market share. The position will be a full time position with a base salary plus a monthly bonus/override.

7 Benefits of the Position

This position requires excellent interpersonal skills and hard work. If you're willing to accept this position, you will enjoy these benefits.

1. **You get to work with some really awesome people** if we do say so ourselves! We are a group of hardworking, thoughtful and fun people and we take our purpose of helping people buy homes very seriously... with a lot of enjoyment mixed in.
2. **There is an opportunity to have a voice** in how PRMI's business is molded. This is not a position where we hope to find just a loyal soldier. Growth as a leader and someone who has a voice with the company is a real thing within our company.
3. **You will meet great people along the way.** Our team works with not only some of the most successful realtors and builders in the industry, but we pride ourselves that we consider each of our referral partners as good friends.
4. **The job is very rewarding.** Our team works with hundreds of families buying their first, second, or even third homes. We are involved in shaping a family's financial future.
5. **You will be paid well.** Your compensation is competitive. As this job is executed with excellence, there are monthly overrides.
6. **We offer health and retirement benefits.** We have all the benefits you will need for an individual or a family.



7. **It is not corporate America.** Primary Residential Mortgage, INC is a large and professional company. Last year we closed over six billion dollars in home loans. Though we have grown year to year, we still maintain a family and fun atmosphere.

Requirements for the Position

These are the non-negotiable traits that any successful candidate will possess.

- **Your default setting is to be proactive, not reactive.**
Introverts and socially shy people need not apply. This is a position for someone who is comfortable getting out there hunting, gathering, and creating relationships. To do this job well, you need to be eager to take action and have a history of getting things done.
- **You bring strong organizational and time management skills.**
Strong time management skills and ability to remain organized are essential skills for this position.
- **You have the ability to work independently.**
Self-motivation disciplines are critical for success. A candidate currently in the mortgage business is ideal but not necessary for the right candidate.
- **You are a technological powerhouse.**
Strong working knowledge of basic programs, CRM's, Google Drive, Excel, and the web are required.
- **You are a socialite.**
Full working knowledge and use of social media platforms.
- **You possess soft skills to attain hard results.**
Skills such as work ethic, verbal tone, proficient writing and communicating, joyful disposition yet tenacious in follow up, and ownership mindset are critical in reaching sales results.
- **You're coachable.**
You possess a willingness and discipline to report results accurately and are willing to accept praise, correction, and re-direction.



7 Examples of What You Will Do

1. **Keep an accurate track of leads and pre-approvals.** Keep a log of all the leads and pre-approvals we have.
2. **Schedule appointments for the Loan Officer.** Proactively reach out to the clients who inquire about a home loan and set up phone calls and face to face meetings with the client and LO.
3. **Make initial and follow up calls** to all potential clients and work within a specific system to create an element of consistency and predictability.
4. **Complete a 1003.** When a client calls in and the LO cannot take the application you will be responsible for taking down all the important information needed in order for the LO to work up the loan.
5. **Prepare cost estimates.** You will work within our origination software system to create accurate cost estimates for clients when they call in.
6. **Find creative ways to reach new market segments and clients.** Utilize our tools and assets consistently to drive clients to our website, ultimately using our services and products.
7. **Keep in touch with referral partners, as well as current and past clients.** Use our tools and systems to keep in touch with our referral partners, as well as past and present clients.

This is a full-time position and it must be your top professional priority. This job requires full time dedication and office presence. Interested candidates, please send resume to Jon Wald at JWald@primeres.com.