

**Job Title:** Sales Operations Coordinator

**Reports To:** Manager, Inside Sales

**Department:** Consumer Sales

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## COMPANY DESCRIPTION

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HomeEquity Bank is the leading national provider of reverse mortgages to homeowners aged 55 and over, Canada's fastest growing demographic segment. HomeEquity Bank originates and administers Canada's largest portfolio of reverse mortgages under the CHIP Home Income Plan™ brand. New mortgages are originated on a direct to consumer basis as well as through referral arrangements with the six largest banks, leading mortgage brokers and financial planning firms. HomeEquity Bank has been the main underwriter of reverse mortgages in Canada since its predecessor; Canadian Home Income Plan Corporation pioneered the concept in 1986.

HomeEquity Bank has a highly effective direct-to-consumer distribution model (B2C), as well as an established referral network (B2B), including Canada's major banks, credit unions, financial planners and mortgage brokers.

HomeEquity Bank is exceptionally well positioned for further growth for a number of very important reasons: 1) positive demographic trends in the 55 years old and over segment, 2) wider awareness and growing demand of reverse mortgages in the market, 3) significant barriers to entry for competitors, and 4) HomeEquity Bank's firm position as market leader.

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## POSITION SUMMARY

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The Sales Operations Coordinator position holds accountability for collecting and processing mortgage applications and documentation. The role liaises directly with the Sales Team, Underwriters and other internal/external parties as required to satisfy all the conditions required for the advancement of files to the Underwriting team.

The ideal candidate must be results oriented and able to manage time-sensitive information, be well organized and work independently with a high priority and focus to deliver excellent Customer Service to our sales force, external partners and internal departments.

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## MAJOR ELEMENTS OF THE ROLE

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This position plays a critical role within the Bank as it requires an understanding of the reverse mortgage product and business process to effectively assist the Bank in providing excellent customer service to all internal and external partners. The role of the Sales Operations Coordinator is to support the processing of new mortgages from receipt of application, validating accuracy of all necessary documentation and confirming they are fit for underwriting. This individual will partner with Sales Agents and act as a resource for questions and ensure files are processed in a timely manner. The Sales Operations Coordinator will have a key role to play in ensuring that Sales Agents

are aware of specific file requirements and enables files to move through to underwriting in a timely manner.

The Sales Operations Coordinator coordinates with various internal clients and partners (Sales Agents and Underwriters) and external partners (Appraisers, other Lenders):

- to ensure a client focused experience – a mortgage structured to meet the client’s needs, funded on the client’s requested timeline, and
- to ensure a properly executed mortgage – a mortgage registered on title providing the Bank with the required appropriate security for the loan.

Key responsibilities of this role include following up on appraisals, reviewing appraisals, gathering the appropriate documentation from the sales team and preparing and submitting files to underwriting. There will be a focus on the collection and review and accuracy of documentation required to ensure all applicable laws, regulations, underwriting guidelines and internal policies have been respected. The role will also act as a sales support administrator for the Referred Sales team including a number of ad hoc requests to support the business.

This role is fast paced with a consistent workload. Expectations are to have a positive client experience every time coupled with accuracy of work and files that fund on time.

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## SKILLS AND EXPERIENCE REQUIRED

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- University Degree or Community College Diploma;
- French/English Bilingual
- Solid understanding of the current financial services environment;
- Results oriented individual and able to manage time-sensitive information;
- Demonstrates solid problem-solving skills and good judgement;
- Good communication and conflict management skills;
- Thrives on variety and continuous improvement;
- Good computer skills (Excel, Outlook, Word, Access and Internet); and
- Well organized and is equally comfortable working on their own as well as being a contributing member of a collaborative team.

HomeEquity Bank complies with the Employment Equity Act. Our Employment Equity program is intended to help ensure that all Canadians have the same access to the labour market and to ensure the full representation of members of the four designated groups which include: women, visible minorities, Aboriginal People and Persons with Disabilities.

If you would like more information on the HomeEquity Bank please visit: [www.heb.ca](http://www.heb.ca). If you'd like to find out more about the CHIP Home Income Plan solution, please visit [www.chip.ca](http://www.chip.ca).

If you are interested in exploring this exciting opportunity with HomeEquity Bank **please forward your resume and salary expectations** in confidence via email: [hr@heb.ca](mailto:hr@heb.ca).

We regret to advise that only those selected for an interview will be contacted. No agencies please.