TASKS MENU

Loan Officers & Mortgage Brokers

Loan officers & mortgage brokers have requested the tasks detail next.

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TASKS MENU

Loan Officers & Mortgage Brokers

Loan Officers & Mortgage Brokers industry companies have requested the following detailed tasks:

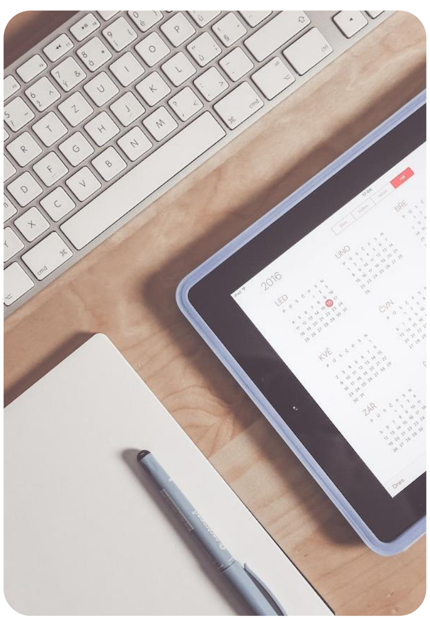
Common responsibilities

01

Evaluating loan applications and determining whether or not to approve them.

Assessing an applicant's creditworthiness and financial history.

Explaining the terms and conditions of a loan to applicants.



Managing loan portfolios and ensuring that payments are made on time.

Developing and maintaining relationships with clients and referral sources.

Executive/Personal Assistant

02

As an executive/personal assistant, the VA will have access to a lot of personal and very private information and must keep it secure and 100% private.

Personal Email management including reviewing, editing, archiving/labelling, prioritizing, etc..

Help the Owner/Founder with various business-related tasks he/she is normally directly responsible for.

Manage & schedule the client’s personal and business calendar.

Answering & screening calls.

Basic project management: Review weekly tasks, processes, and projects due.

Follow-up with Leads & Potential Clients

03

Create follow-up email templates, texts or scripts.

Follow up with potential customers to answer questions and set up appointments or demos.

Follow-up by email or text messages.

- Follow up with leads/clients an infinite number of times until they reply.
- Follow up with prospects/leads that did not show up to an appointment and ensure they reschedule.

Customer Service & Support

04

01 Reply to emails & phone calls.

02 Pick up the phone, and talk to anyone who needs help.

03 Report and add any support-related issues into CRM System.

04 Use a VOIP phone (Internet phone) provided by the client, which can be accessed through the computer for inbound/outbound calls.

05 Talk to people who are mainly existing clients, as well as new potential ones.

06 Answer calls from new people requesting info.

07 Follow-up calls with leads, vendors, clients, etc

08 Lead management (filter and sort leads of potential new clients).

Manage CRM & Data Entry

Convert files into digital format in Excel sheets.

Help the company organize, clean, update, and maintain the client database.

Maintain all communication and client data up-to-date.

Add new clients & update existing ones in the CRM system.

Create and publish jobs, events, listings, etc in 3rd party sites: Facebook, Craigslist, etc.

Calendar Management & Appointment Setting

06

- Pre-screen new potential clients and make sure they're the right fit to be clients .
- Help the client/owner of the company manage his/her email and calendar.
- Prioritize and respond to emails, set up email filtering, and delete spam or unimportant emails.
- Coordinate with multiple people by making calls and handling email.
- Set up automatic bookings online, and share booking links with clients as needed.

Other General Admin Tasks

07

Update spreadsheets.

Email sorting and organization.

Create PowerPoint/Google Slide presentations.

Book A Call

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