

JOB DESCRIPTION

Job Title: Case Handler	Existing Job Holder:
Department: Remortgage Team	Reports to: Team Manager

Purpose of the Role

- Processing of remortgage cases from instruction to completion
- 9am to 5pm Monday to Friday or other as appropriate
- Using Visual Files software package **or** in-house case management system
- Utilisation of agreed services and systems from third party suppliers as required such as Thirdfort, Title Solve, and HMLR
- Work with one or more of the following teams: RBSG and Private Remortgage

Key Accountabilities

- To process all remortgages within the brand SLA guidelines
- Process of received documents and letters
- Collating documents for file preparation, set- up and checking
- Continual updating of Visualfiles Database **or** in-house case management system
- Updating of brand software package where applicable
- Production of legal documents to client and customer
- Production of additional letters pertaining to instruction
- Preparing file – pre and post completion
- Managing pipeline by advancing cases, chasing outstanding documents, abandoning non-active cases

Quantitative Information

- Maintaining a case load of up to or exceeding 300 files
- Excellent customer service
- Bonuses based on achieved targets

Key Challenges

- Hold a professional attitude to all cases
- Assist with all client cases where required
- Use knowledge to assist others
- Clients include volume introducers RBSG and Private Client
- Resolving client, broker or customer query by telephone letter and email as required
- Complete call backs within 24hr of request
- Flexibility to work within, move or assist other teams when required



Working relationships

- Liaison with internal teams
- Team Manager
- Liaison with Lenders, Solicitors, Brokers, Client and Customers



Remortgage



Sale



Purchase



New Build