



*Mortgage Planning Specialist
Term 1 year
Ottawa, Ontario Area*

We're Investors Group – a Canadian leader in providing personal financial planning services, and dedicated to building lasting client relationships. This is your opportunity to build a career with a leading organization where you can learn, grow and thrive both professionally and personally.

Our vision is to be the best financial services company serving the long term needs of individual Canadians.

At Investors Group:

- We relate to our diverse clients through **Comprehensive Planning.**
- In all of our endeavours we are **Diligent In Our Efforts.**
- We respect each other and the communities we serve by being **People Who Care.**

If you share our vision and values, we'd like to hear from you.

We are currently looking for a Mortgage Planning Specialist to join our offices in Ottawa.

Primarily responsible for the attainment of specified volume objectives of residential mortgage loans, investment loans and other loans secured by way of real estate for Investors Group clients. Provides expert advice to Investors Group Financial Services (IGFS) Consultants on Investors Group's mortgage credit product shelf.

Responsibilities include:

- Directly assists the IGFS Consultant by providing expert advice and guidance to existing IG clients with respect to their mortgage planning and other credit requirements, including product selection or price negotiations.
- Ensures value-added client service is exemplified in all mortgage/credit-application situations, while remaining cognizant of I.G. Investment Management, Ltd. (IGIM)/Solutions Banking mortgage/credit lending guidelines, appropriate risk assessment, and regulatory requirements.
- Responsible for completion of mortgage loan application and submission of all required supporting documentation for approval to applicable IGIM Mortgage Origination centre. Obtains client's credit bureau report via accessing Equifax's Internet website, and, when applicable, also performs online submission of mortgage insurance application to Canada Mortgage and Housing Corporation or GE Capital.
- When required responsible for the completion of the credit application and the submission of supporting documentation for approval to Solutions Banking credit centre.
- Promotes value-added client service in all personal contacts, while also recognizing when alternative distribution channels (i.e., 1-800# or web-based) are best suited for the client's circumstances.
- Provides informative mortgage credit product presentations/training to IGFS Consultants.
- Serves as an expert contact for IGFS Consultants on new or unfamiliar situations with mortgage credit products.
- Participates in various local IGFS Regional events to ensure mortgages/banking products are appropriately represented on a local level, and consistently promotes the benefits of cross-sell/up-sell product opportunities.

Qualifications:

- 4-7 years in a related mortgage underwriting/client service/banking products environment.
- Post-secondary diploma in Business Administration or in a related field.
- Strong PC skills including Microsoft Windows, Word, Excel, PowerPoint, and online mortgage/banking credit adjudication /approval systems.
- Possession of a mortgage brokers license or be working towards obtaining a license.
- Business related courses such as Real Estate Law and Canadian Banking are an asset.

To apply for this position, send a cover letter and resume, indicating the position title, to:
humanresourceeastcanada@investorsgroup.com. Deadline for applications is March 1, 2012.

We thank all applicants, however, only those under consideration will be contacted.