

**Job Description – Administrator/Receptionist – Westshore**  
**June, 2023**

Receptionist duties which include:

- a) answering phones
- b) redirecting calls
- c) mail and fax distribution
- d) stationery ordering

General and Broker Administration which include:

- a) faxing of mortgage information
- b) photocopying documents
- c) filing and storage of files
- d) updating rate signage
- e) updating lender product comparison templates
- f) verification of compliance forms
- g) collation and organization of client files
- h) redirection of invoices and commission cheques to Head Office
- i) completion of commission and accounts receivable payments
- j) marketing mail merges
- k) follow-up thank you letters to clients
- l) designation and management of referrals to Select Mortgage Corp via website, email and telephone.
- m) internal courier service from branch to branch when required
- n) maintaining office supplies (coffee, janitorial, etc.)
- o) all other duties as assigned by Chief Operations Officer

Specific company duties:

- a) Management of company social media accounts
- b) Management of company & broker Customer Relationship Management system.

Technical support to office with respect to computers, phones and required software as well as responsible to perform upgrades or changes to system as assigned by management.