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THE OFFSHORE BROKING TASK LIST

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MORTGAGE BROKING OFFSHORE TASK LIST

LOAN PROCESSORS

Data Entry	Lodgement	Settlement
CRM Data Entry to ensure all client data from supporting documents is correct, and that all supporting documents are saved.	Lodge deals via Apply Online.	**Prepare Discharge Forms.**
Documents Saved with the correct file name and within the correct subfolder.	**Liaise with Lender/Assessor** to ensure they are satisfied with all the documents and are prepared to offer the loan to the client	**Prepare Lender Forms** and send to client for signing.
Send Compliance Documents to be signed by the Client. Includes the Credit Guide, Privacy Statement, and Credit Proposal.	**Update the Client every 2-3 days on how their application is progressing.**	**Liaise with Client Solicitor and Lender Solicitor** to coordinate settlement
Populate **lender application** forms accurately from broker notes or client fact-finds.	**Validate figures** entered in the lender serviceability calculator against the broker's notes.	**Confirm Settlement** and Loan information with the Client.
	Double-check lender portal.	Update status to "Settled".
		Prepare settlement instruction sheets or checklists for broker review.

CUSTOMER CARE

Client Onboarding	Maintenance	Adhoc Requests
Confirm Loan Details with Client including that linked accounts are set up correctly, credit cards have been received, ensure internet banking is working, confirm repayment frequency and amounts.	**Conducting Annual Reviews** and checking pricing with their current lender on the anniversary of the loan.	**Generating reports** (e.g. pipeline, settlement, or commission summaries).
Point of Contact for Client moving forward (unless the client requires additional lending, in which case the Broker gets involved).	**Fixed Interest & Interest Only Expiries,** ensuring the client's loan doesn't default to an uncompetitive rate.	Supporting the onboarding of new brokers or team members by setting up access, file structures, and trackers.
Enter or update client contact details, referral source, and deal owner.	**Construction Loan Drawdown Requests,** organising on behalf of the client with the lender.	Following up with lenders on progress draws, valuation status, or loan documentation delays.
	Populate rate-reduction or repricing request forms for broker submission.	Submitting **bank account detail changes** or repayment frequency amendments to lenders.

admin@wingmangroup.com.au www.wingmangroup.com.au

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CREDIT

Loan Structure & Package	System & Documentation	Post Submission
Assess client scenario to determine the most suitable lender options based on policy. servicing, and loan structure.	**Review and verify client data** within the CRM and lender platforms.	**Liaise with lenders** for scenario clarification.
Work closely with the broker to structure the deal effectively	**Complete internal checklists** and submit comprehensive deal notes for seamless processing.	**Manage any credit critical follow-up** and escalate urgent matters to the Broker
Calculate servicing capacity and recommend the most viable product options	Conduct **regular data hygiene** checks - ensuring inactive or duplicate records are archived or merged correctly.	Notify the broker once all **conditions are satisfied** and ready for final approval.
Compare loan products and rates across multiple lenders based on broker guidance.	Ensure all data entered into CRMs and trackers aligns with the brokerage's workflow stages (e.g. "Onboarding," "Lodged," "Settled").	**Update checklists** for each condition and assign follow-up tasks (e.g. valuation, updated statements, insurance).
Rename files according to lender naming conventions.		Maintain updated copies of conditional approval letters.

OTHER SUPPORT

Administration	Marketing	Operations
Ordering **settlement gifts.**	Manage email marketing contacts and **send monthly newsletter.**	**Prepare slide decks** or visual dashboards for internal reporting meetings.
Managing **calendars** and **inboxes.**	Use Canva templates to create and **post social media tiles** and stories.	Assist with onboarding or offboarding brokers or RPs.
Send confirmation emails or SMS reminders for appointments.	Assist with sourcing relevant **content for social media** e.g (articles, RBA updates).	Record lender SLAs, rate updates, and policy changes in shared tracker.
Organise digital files and maintain naming consistency across systems.	**Send Google review** requests to recently settled clients.	**Prepare weekly "Pipeline Snapshot" reports** (settlements, pre-approvals, lodgements).
Track post-meeting and post-call notes.		

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