



**Job Title:** Account Executive

**Reports To:** Chief Business Development Officer

**Job Description:** Pivot Lending Group is looking for a results-oriented, experienced Account Executive looking to make a visible impact on a growing company. You will generate business by selling our mortgage related products into new accounts and then expanding opportunities within those accounts. Our Account Executives are tasked with identifying, generating, and closing sales opportunities through outbound calling activities. This is a true sales role which includes generating new business as well as account management. Our ideal candidate is a performance-driven individual who enjoys working in a fast-paced environment.

***Daily responsibilities include, but are not limited to:***

- Sell Pivot Lending Group as a mortgage solution to credit unions and community banks within a defined territory
- Establishes and maintains an effective business plan of attack for Pivot Lending Partners and provides weekly communication to the Chief of Business Development.
- Responsible for establishing new business, developing current business relationships, and ensuring overall client satisfaction
- Build, manage, and continually develop a sales pipeline using inbound leads and outbound prospecting to achieve targets, review pipeline with leadership regularly
- Maintains sales contact, pipeline and other pertinent sales activity reports and uses Contact Management Software
- Drive increased engagement of our programs through effective questions, conversations, and ongoing relationship management
- Responsible for soliciting business from mortgage entities (Open territory)
- Follow up on potential clients
- Provide on-going service support to clients
- Make outbound calls to new prospects and existing clients
- Conduct introductory calls with new business prospects and present Pivot's value proposition
- Accurately enter, update, and maintain contact information and keep comprehensive and up-to-date client information daily in our Contact Management System.
- Deliver Pivot Lending products with online presentations to existing clients and new prospects
- Be entrepreneurial in your approach, continuously innovate and have confidence during each call
- You will collaborate daily with our Marketing team to drive job completion rates
- Give excellent customer service to each contact
- Work together with Operations Staff to facilitate loans from Submission to Funding
- Obtains approval packages for new clients when needed
- Communicates and trains clients on Pivot Lending products, policies, and procedures to ensure all loan files are complete and within guidelines
- Stay abreast of indices, market changes, and underwriting guideline changes to discuss the mortgage market in an informed fashion

***Travel Required:***

- Must have a valid driver's license with a good driving record
- Regional and or State to State travel
- Mileage/Fuel reimbursement or company car provided

***Professional Experience, Education and Qualifications:***

- Bachelor's Degree or equivalent professional experience
- 1-2 years of experience as Account Executive inside or outside sales in Wholesale lending channel
- Prior Wholesale Account Executive experience preferred
- Minimum of 3 years mortgage industry experience
- Excellent computer skills and working knowledge of MS office products
- Ability to communicate effectively both verbally and in writing
- Strong Customer service skills
- Ability to organize and prioritize workload and meet deadlines

***Compensation and Benefits:***

- \$60,000 annual guarantee
- 35 bps override monthly less guarantee
- 100% paid health benefits for employee
- Elective dental and vision coverage
- Short term and long-term disability offered
- 401k retirement options

***Other Duties:*** This job description is not intended to be an all-inclusive list of job duties and responsibilities, as one may perform additional related duties as assigned to meet the needs of the organization.

***Equal Opportunity Employer:*** Pivot Lending Group is an equal opportunity employer that is committed to diversity and inclusion in the workplace. We prohibit discrimination and harassment of any kind based on race, color, sex, religion, sexual orientation, national origin, disability, genetic information, pregnancy, or any other protected characteristic as outlined by federal, state, or local laws. This policy applies to all employment practices within our organization, including hiring, recruiting, promotion, termination, layoff, recall, leave of absence, compensation, benefits, and training. Pivot Lending Group makes hiring decisions based solely on qualifications, merit, and business needs at the time.

***Work Authorization:*** Must be able to verify identity and employment to work in the U.S.

***Physical Demands:*** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Must be able to lift up to ten pounds. Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a keyboard; and to verbally communicate to exchange information