

## **Job Description: Mortgage Capital Markets Customer Success Manager**

### **About HomeLend**

HomeLend is transforming the mortgage industry by offering an innovative technology platform, which provides the entire infrastructure required to directly invest in mortgage loans and serves as a trading hub for both buyers and sellers of mortgages.

### **Position Overview**

As the Capitol Markets Customer Success Manager, your mission will be to lead a frontline seller-success center, supporting the expanding network of loan sellers utilizing the HomeLend platform, including independent mortgage banks and depository institutions.

- Act as the customer-success and problem-solving partner for sellers, addressing their questions regarding eligibility, pricing, platform usage, loan status and the likes.
- Proactively reach out and enhance relationships with sellers to drive engagement, platform adoption and loan sales to investors on the HomeLend platform.
- Partner with internal product, marketing, and sales teams to enhance seller experience and operational efficiency.

### **Key Competencies Required**

- A blend of strong sales orientation and robust analytical capability.
  - You must proactively reach out to and build relationships with customers.
  - Discussions with customers typically require a solid understanding of mortgage investment, including the eligibility and pricing criteria and purchase process.
- Strong communication and relationship-building skills; client focus.
- Thrives in a fast-paced, collaborative environment.
- Comfort with financial industry concepts.

### **Required Qualifications**

- Bachelor's degree with strong academic performance
- At least 3 years of mortgage industry experience including in correspondent lending and/or to loan purchases.
- Experience dealing with mortgage eligibility and pricing.
- Tech savviness:
  - High level of proficiency in all Microsoft® Office applications (PPT; Word; Excel).
  - You will need to understand the HomeLend platform thoroughly.

### **Desired Qualifications**

- Solid domain expertise in whole loan pricing and understanding of guidelines and rate sheets.
- Exposer to and understanding of key pain points and business decision drivers of loan originators.

### **Compensation & Perks**

- Compensation will include a competitive salary, performance-based bonus, and stock options through the Homelend's ESOP, providing the opportunity to share in our success.

### **Additional Details**

- Hybrid | at least 5 days/month in the NYC office (more during onboarding)
- Occasional travel may be required