

Asset Finance – Onboarding Officer

Reporting Line: Team Leader – Asset Finance Onboarding

Role Level: 6

Location: Office-based

About Us

We are Oxbury: The only UK bank dedicated to British agriculture. Founded by farmers, bankers, and technologists, we have combined the worlds of financial services, technology, and agriculture to provide bespoke financial products to support the rural economy.

Our mission is to create and grow a sustainable, customer-focused, and innovative bank that supports and champions the financial health of the rural economy.

About the Role

Responsible for supporting the sales team in delivery of the business plan by receiving finance proposals. Responsible for undertaking defined process steps to check companies and individuals through our onboarding journey, this includes performing all due diligence checks and you will need to have the ability to investigate any queries escalating with our compliance area if required. You will be responsible for generating finance and security documentation and progressing your deals to pay out. First class communications skills will deliver exceptional service to both the customers and broker networks.

Role Responsibilities

- Attention to detail is a key requisite to ensure that data provided via the broker network is transferred accurately to the Oxbury CRM system.
- Undertake personal identity checks, plus Fraud and PEP checks where appropriate.
- Undertake Business credit and verification checks.
- Alert to recognising potentially fraudulent activity or vulnerable customer requirements ensuring that you report and escalate as required following policy and regulatory procedures.
- Preparation of legal documentation which will include finance agreements and security documents.
- Ensuring bank verification is complete.
- To follow processes correctly and in a timely manner to ensure that service level agreements are met.
- Manage own cases from inception to pay out to suppliers following due diligence procedures.
- Prepare and send out executed documentation.
- Handle and resolve broker queries in a timely manner and to a high standard. Ensure we provide the resolution with the utmost level of customer service.
- Effective communication skills, both written and verbal, and ability to tailor communication to a variety of audiences.
- Understand the background of the query, do required research with the provided tools, and respond appropriately.
- Where an issue cannot be resolved, escalate, or communicate to the Asset Finance Operations Manager when necessary.

- Build appropriate meaningful relationships with the broker network demonstrating a practical 'can do' attitude and becoming a trusted point of contact for queries through to resolution.
- Connect with customers at a professional level and build rapport with them.
- Undergo the required training and regulatory training, applying it where it's required throughout day-to-day activities.
- Building strong relationships with the Asset Finance Sales Team and Relationship Managers.
- Identifying new system functionality and working with IT to implementation.
- User acceptance testing.
- Contribute to the positive development of a diverse and inclusive culture.

Minimum Skills / Experience

Required Skills / Experience

- 2 years + customer services experience, preferably in a financial services environment.
- Clear and concise communication skills via telephone, and email.
- Good numerical skills.
- Demonstrable experience of adhering to SLA's, policies and processes.

Desirable Skills / Experience

- Experience of working within the Asset Finance industry.
- Knowledge of customer due diligence within the financial services sector.
- Agricultural knowledge or background would be welcome.
- Reliable, honest and can contribute to create a thriving culture.
- A passion for delivering outstanding customer service.
- Desire to continually develop and improve.
- Experience of working with vulnerable customers.

Interested in joining Oxbury?

Interested candidates should submit their CV and a brief covering letter outlining their experience in agriculture, any previous work experience and why they believe they are suitable for the role. To apply please click [here](#).