



TITLE: Client Support Specialist
REPORTS TO: Chief Operating Officer
DEPARTMENT: Operations
REVISION: 1/28/2025

MANAGEMENT: Offshore FTEs
EXEMPTION STATUS: Exempt
LOCATION: Corporate Office

JOB SUMMARY:

As a Client Support Specialist at ARDRI, you have the key role in ensuring a seamless experience for mortgage brokers and other external clients. This position focuses on overseeing the Third-Party Originator (TPO) Oversight Department, managing broker approval packages, and serving as the first point of contact for inbound client inquiries. The ideal candidate is proactive, detail-oriented, and customer-focused, with strong communication and organizational skills.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- TPO Oversight and Broker Approval
 - Supervision and coordination of Offshore Full-time Employees (FTEs) responsible for TPO Broker Support.
 - Provide timely and accurate updates, both verbally and written to brokers throughout the approval process.
 - Address and resolve any issues or concerns that arise during the broker approval process.
 - Maintain accurate records and ensure compliance with internal and regulatory standards.
- Client Communication and Support
 - Act as the first point of contact for inbound calls from mortgage brokers, providing answers to questions related to the broker approval packages and general inquiries.
 - Respond to and manage inbound website chat inquiries and email inquiries professionally and in a timely manner.
 - Utilize active listening and problem-solving skills to resolve client issues or direct them to the appropriate department.
- ARDRI Hub Support
 - Provide guidance and support to users navigating the TPO Portal, ARDRI Website and askARDRI.
 - Ensure clients have access to updated job aids, policies & procedures and assisting with troubleshooting as needed.
- Collaboration and Coordination
 - Work closely with internal teams to ensure client concerns are addressed and escalated appropriately.
 - Serve as a liaison between brokers and various departments to ensure seamless communication and resolution.
 - Collaborate with account executives, account managers and operations teams to facilitate smooth processes.
- Administrative Duties
 - Track and log all interactions in ARDRI Hub to ensure accurate and complete records.
 - Assist with periodic reporting on TPO oversight activities and client support trends.
- Adhere to all applicable internal, external, and regulatory procedures.
- Perform other related duties as assigned.



ESSENTIAL KNOWLEDGE, SKILLS, AND ABILITIES:

- Strong verbal and written communication skills.
- Excellent customer service and interpersonal skills.
- Proficiency with CRM systems, chat tools, and email management platforms.
- Ability to multitask, prioritize, and work in a fast-paced environment.
- Knowledge of mortgage loan products, underwriting procedures, and creditor financial analysis techniques.
- Customer service driven; responsive to client issues and concerns internally and externally.
- Strong team player, ability to work with general supervision while performing duties. Proven ability to manage multiple accounts, pipeline management and meet deadlines.
- Detail-oriented with a commitment to maintaining accuracy and compliance.
- Proficient familiarity with Microsoft Office applications including Word, Excel, and PowerPoint.

EDUCATION, EXPERIENCE AND/OR LICENSES:

- Bachelor’s degree in finance, business, or a related field preferred.
- 2 years of client support experience, preferably in the mortgage banking or financial services industry.
- Familiarity with TPO processes and broker approval requirements is a plus.

SUPERVISORY RESPONSIBILITIES:

Does this job have supervisory responsibilities? No: _____ Yes: X How many? TBD
 Are there subordinate supervisors reporting to this job? No: X Yes: _____ How many? N/A
 Are there employees reporting directly to this job? No: X Yes: _____ How many? N/A
 What is the total number of employees who report both directly AND indirectly to this job? TBD

PHYSICAL DEMANDS:

Physical Requirement	Continually (every day)	Frequently (2-3 times per week)	Occasionally (2-3 times per month)	Rarely (less than one time per month)	Never
Seeing	X				
Hearing	X				
Stooping/bending			X		
Moving around the office	X				
Driving to and from office	X				
Speaking	X				
Lifting/carrying (up to 10 pounds)				X	
Standing for long periods				X	
Working outside					X
Using hands/fingers	X				
Reaching/overhead	X				



WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The environment is an indoor office environment reasonably clean, well-lit, and ventilated. Generally, there is little or no probability of injury or health impairment due to physical hazards and the noise level is moderate with normal business office machines and light to moderate foot traffic.

CONFIDENTIAL DATA:

This position may be exposed to confidential information about the company, our customers, and other employees on a regular basis. Disclosure of such information to any outside party in a business or social context can seriously impact the company and may jeopardize the relationship of trust we enjoy with our customers. Please refer to the Confidentiality and Information Security sections of the Employee Handbook for additional guidelines regarding the protection of confidential data.

Management reserves the right to change this job description and standard ratings at any time according to business needs.

Employee Signature Employee Name (Print) Date

Approval Level	Name	Status	Date
Compensation Department	N/A	N/A	
Supervisor	N/A	N/A	
COO	Brent Houston	Approval	
CEO	Brian O’Shaughnessy	Approval	