



**TITLE:** Senior Account Executive  
**REPORTS TO:** National Sales Manager  
**DEPARTMENT:** Sales  
**REVISION:** 1/29/2025

**SALARY GRADE:** TBD  
**EXEMPTION STATUS:** Exempt  
**LOCATION:** Field/Remote

### **JOB SUMMARY:**

As a Senior Account Executive at ARDRI, you will be responsible for cultivating and managing strategic relationships with mortgage brokers, bankers, and other third-party originators. This role focuses on building new business partnerships, promoting ARDRI's suite of mortgage products, and providing exceptional client service. The ideal candidate will have a deep understanding of wholesale non-qm mortgage banking, a passion for sales, and a drive to exceed performance targets.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES:**

- **Prospect and Acquire New Business:** Identify and target prospective mortgage brokers and third-party originators to expand the ARDRI's market presence and grow a portfolio of business partners by visiting broker offices and place of work.
- **Relationship Management:** Build and maintain strong, long-term relationships with existing clients by understanding their needs and providing tailored solutions.
- **Product Promotion:** Educate brokers on ARDRI's products, services, pricing structures, and lending guidelines. Drive sales of mortgage products by articulating the competitive advantages of ARDRI's offerings.
- **Sales Strategy Implementation:** Develop and execute strategic sales plans and call schedules to achieve sales goals.
- **Market Awareness:** Keep up to date on industry trends, competitive landscape, and regulatory changes impacting the mortgage industry. Provide feedback to management on market conditions and competitive activities.
- **Client Support:** Act as a liaison between brokers and internal operations, ensuring a seamless loan process from origination to closing. Troubleshoot issues, answer inquiries and provide ongoing support.
- **Reporting and Forecasting:** Regularly track and report sales activities, key performance metrics, and forecasts to the National Sales Manager.
- Provide training and assistance for continuous process improvement.
- Adhere to all applicable internal, external, and regulatory procedures.
- Perform other related duties as assigned.

### **ESSENTIAL KNOWLEDGE, SKILLS, AND ABILITIES:**

- Strong understanding of mortgage products, pricing, and wholesale lending guidelines. Familiarity with underwriting processes and secondary market trends.
- Exceptional communication and negotiation skills.
- Ability to build and maintain productive client relationships.
- Strong analytical, problem solving, written and verbal communication skills.
- Customer service driven; responsive to client issues and concerns internally and externally.
- Superior organizational and time-management skills.
- Strong team player, ability to work with general supervision while performing duties.
- Proficient familiarity with Microsoft Office applications including Word, Excel, and PowerPoint.
- Experience utilizing a Customer Relationship Management "CRM" system keeping contact data current.

- Goal-oriented with a track record of meeting or exceeding sales targets.

**EDUCATION, EXPERIENCE AND/OR LICENSES:**

- 3+ years of proven sales experience in the mortgage or wholesale banking industry, preferably in an outside sales role.
- Strong working knowledge of residential lending loan documentation products, policies, and standard industry guidelines.

**SUPERVISORY RESPONSIBILITIES:**

Does this job have supervisory responsibilities? No:  X  Yes:       How many?  N/A   
 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?  N/A

**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 clients' 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.**

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Employee Signature	Employee Name (Print)	Date
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