

# Associate Client Advisor – Professional Services

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## Who we are

OptiFunder is a leading mortgage technology provider focused on delivering first-to-market solutions that transform warehouse management and secondary market operations. Our Professional Services team ensures clients realize the full value of our platform through expert configuration and implementation.

## Who you are

You are an early-career professional eager to build expertise in mortgage technology and workflow configuration. You thrive in learning environments, demonstrate strong attention to detail, and collaborate effectively with peers and clients.

## How you'll make an impact

- Support client configuration outcomes by executing well-defined tasks under guidance.
- Learn OptiFunder's system architecture, tools, and data flows to build foundational expertise.
- Assist in gathering and documenting business requirements for scoped work.
- Validate configurations and perform basic troubleshooting with support from senior team members.
- Contribute to client conversations as a supporting resource to build confidence and trust.
- Complete foundational certifications in the Configuration Mastery Program to demonstrate readiness for progression.

## Do you have what it takes?

- Strong attention to detail and ability to follow SOPs and standards.
- Eagerness to learn new systems, workflows, and mortgage industry concepts.
- Ability to execute scoped configuration tasks accurately and reliably.
- Collaborative mindset with openness to coaching and feedback.
- Adaptability to shifting priorities and process ambiguity.
- Commitment to professional growth and continuous learning.

## **Benefits & Culture**

We offer competitive compensation, comprehensive benefits, and a culture that values growth, collaboration, and innovation. Our team is committed to supporting your professional development and career progression.