

Client Advisor – Professional Services

Who we are:

OptiFunder is an Inc. 5000 top 100 FinTech company and the pioneer of the Warehouse Lending Management System for mortgage originators. We provide advanced technology solutions that help lenders and warehouse banks process more loans, reduce origination costs, and increase operational efficiency across the mortgage lifecycle.

Who you are:

You're a trusted advisor who thrives at the intersection of technology and mortgage expertise. You combine analytical rigor with empathy, translating complex business needs into elegant, rule-driven solutions. Curious and adaptable, you embrace ambiguity and turn it into clarity for clients. You're hands-on—ready to configure, validate, and optimize workflows that make a measurable difference. With deep industry experience and a passion for continuous learning, you bring confidence and creativity to every engagement.

How you'll make an impact:

- Deliver first-to-market technology that transforms how mortgage originators and warehouse banks operate.
- Own client outcomes end-to-end—gathering requirements, designing workflows, and configuring solutions that reduce risk and improve performance.
- Collaborate with project managers, subject matter experts, analysts, and Customer Success to drive satisfaction and measurable results.
- Provide data-driven decision support through scenario building, multi-factor analysis, configuration review, and environmental assessment.
- Configure in an open-source, rule-based admin system to build client instances and improve them through iterative validation.
- Build client trust through expert consultation on warehouse performance variables and strategies; engage internal teams as needed.
- Articulate complex technical concepts to non-technical stakeholders via meetings, calls, and clear written communication.
- Develop best practices for scalability, supportability, ease of maintenance, and system performance.
- Use integrated business analysis tools (Excel, GCP Data Studio, Postman) to inform exports/mapping, business rules, and other aspects of configuration.
- Test new releases/deployments after hours on occasion to ensure readiness and quality.

Do you have what it takes?

- Bachelor's degree in a related discipline and a track record of continuous learning.
- Thorough understanding of the loan origination process acquired in mortgage or financial services roles.

- Experience building complex matrices of requirements without a standard rules engine; extreme focus and attention to detail.
- Broad experience with conditional formatting and the ability to translate requirements into rules and decision logic for system evaluation.
- Extensive practice configuring, testing, and troubleshooting new applications and systems.
- Familiarity with workflows and capabilities of LOS platforms (Encompass, MeridianLink, Byte, Empower, Blue Sage) and warehouse platforms (WLS, ProMerit).
- Ability to thrive in a virtual team and demonstrate engagement.
- Self-motivated, energetic, able to pivot with shifting priorities and process ambiguity.
- Authentic client-facing skills: building rapport, establishing trust and credibility, and exchanging clear, professional messages.
- Agility and adaptability toward new system features and ongoing development.
- Proficiency with MS suite and collaborative tools; Excel power user is a plus.

You might be a good fit if you like to:

- Listen with curiosity, build collaborative relationships, and strive for mutual gain in all interactions.
- Learn new concepts, processes, software, engineering, and mathematical ideas.
- Solve data-related problems and extract insights from initially unwieldy datasets.
- Bring clever ideas to the team and develop creative ways to frame or solve a problem.
- Help decision makers become more reliant on data.
- Take ownership for your work and learn from your mistakes.
- Engage with clients to understand business challenges and roll up your sleeves to configure, test, and deliver.
- Stay aligned with priorities, even if that means switching gears or multitasking.

What you'll learn:

- All about our proprietary, transformative mortgage tech
- How to integrate industry-standard LOS and warehouse bank platforms
- Deeper knowledge of mortgage workstreams and maximizing efficiency

Benefits & Culture:

- Competitive salary and performance-based bonus eligibility.
- 401k with company match.
- Comprehensive medical, dental, and vision coverage.
- Generous leave policy; paid Federal holidays.
- Fully remote eligible; dress for comfort and calendar (up your game for clients).
- Friendly, energetic, inclusive, high-performance culture with growth opportunities.