

Senior 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:

The Senior Client Advisor is a seasoned professional who combines deep mortgage industry expertise with advanced configuration mastery and strategic thinking. You thrive on solving ambiguous, multi-variable challenges and influencing standards that elevate team performance. You are a systems thinker, coach, and trusted advisor who strengthens the practices that enable client success—without formal people management.

How you'll make an impact:

- Own and deliver the most complex or high-risk client configuration outcomes.
- Diagnose systemic issues and prevent recurrence through proactive design and pattern recognition.
- Author and refine SOPs, QA criteria, and configuration standards; govern quality practices across the team.
- Coach and mentor Client Advisors via review, pairing, and actionable feedback; elevate team capability.
- Serve as liaison for an assigned product line; synthesize insights for Product and Leadership and prepare the team for releases.
- Anticipate risk and ensure readiness for product and system changes across clients and workflows.

Do you have what it takes?

- Bachelor's degree in a related discipline and a record of continuous learning.
- Extensive experience in mortgage or financial services with deep understanding of loan origination workflows.
- Proven ability to design and execute complex/novel configurations and troubleshoot systemic issues across clients.
- Advanced proficiency with LOS platforms (Encompass, MeridianLink, Byte, Empower, Blue Sage) and warehouse systems (WLS, ProMerit).
- Strong coaching and mentoring skills; ability to influence without authority.
- Expert-level certifications in OptiFunder's Configuration Mastery Program (multiple Expert certifications; Outcome Certified across priority domains).

What you'll learn:

- How to shape standards and governance for a first-to-market technology platform.
- Advanced strategies for risk prevention and systemic improvement.
- Leadership presence and influence without formal people management—impact through coaching and systems thinking.

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.