

Customer & Settlements Specialist

Avanti Finance Group is a privately owned specialist lender operating across New Zealand and Australia. We're on a growth mission to lead and inspire our industry through innovation and the development of exceptional financial services, while fostering a motivated and engaged workplace culture centred around personal growth and high performance.

Reporting to the Settlements Manager, the Customer & Settlements Specialist is a hybrid role responsible for delivering a seamless customer experience while supporting the accurate and compliant processing of loan settlements. The role acts as a key point of contact for customers, providing clear, professional support across multiple channels and contributing to strong customer outcomes across the loan lifecycle.

The role also supports settlement and verification activities to ensure loans are processed accurately, on time, and in line with regulatory and operational requirements, while working collaboratively with internal teams to support business outcomes and continuous improvement.

IN THIS ROLE, YOU WILL:

Do-the-Doing

- > Complete end to end settlement and verification activities in line with legal, compliance, and operational requirements.
- > Maintain accurate, timely, and high-quality data and documentation across all loan and customer systems.
- > Verify customer identity, income, and supporting information in accordance with policies, procedures, and regulatory standards.
- > Proactively follow up outstanding information with advisers, brokers, dealers, lenders, and internal stakeholders to support timely outcomes.
- > Respond to customer and partner enquiries efficiently, resolving issues end to end and escalating where required.
- > Identify recurring issues, risks, or inefficiencies and contribute to process improvements and operational enhancements.
- > Flexibly move between Customer Service and Settlements functions to support workload demands, service levels, and overall operational effectiveness.

Always Ensure Integrity, Risk and Compliance.

- > Apply a risk and compliance lens, ensure legal adherence, and manage all day-to-day risks through the appropriate channels.
- > Operate with integrity by upholding high standards in compliance and risk management through adherence to the three lines of defence model.

Living Our Values: Champion the Customer, Win Together, Do What's Right, Be Curious.

- > Be a team player and follow your manager's reasonable instructions, performing additional duties as needed.
- > Bring your whole self every day, to proactively promote a wellness, inclusive, health and safety conscious culture at Avanti.

THE SUCCESSFUL CANDIDATE WILL HAVE:

- > Demonstrated experience (typically 2+ years) in customer service, settlements, collections, or operational roles within a regulated or service driven environment.

- > Strong understanding of compliance, accuracy, and operational discipline, ideally with exposure to financial services, lending, or AML related processes.
- > Well developed verbal and written communication skills, with the ability to manage complex or sensitive conversations professionally and confidently.
- > Proven problem solving capability, sound judgement, and strong organisational skills, enabling effective prioritisation and ownership of work across competing demands.
- > Adaptable and collaborative, with confidence using customer service, case management, and telephony systems, and a demonstrated continuous improvement mindset.

OPERATIONAL DETAIL:

Location	Wynyard Quarter, Auckland CBD
Department	Settlements and Customer Services
Reporting to	Settlements Manager
Direct reports	This role has no direct reports
Internal relationships	All members of the Avanti Finance team
External relationships	Customers, Brokers, Introducers and Agents