Roles and Responsibilities of Finance Desk

Daily

* review deal structures to ensure that signed documents match the call back from the bank. (call banks, rehash, exceptions)
* check CEO schedule to make sure that all early CEO’s are here (call / text if not Mike, Vance, Geremy)
* evenly distribute all good leads. kill bad leads and send the 450 credit email
* review outstanding deposits. followup with CEO’s to have committed appointments for deposits
* provide funding support as needed. followup with any funding discrepancies

Finance Alignment Huddle - 10:00am

Mike and Vance 10:30 to 12:00

* CEO check-ins
	+ review active leads
	+ confirm set appointments
	+ assess engagement

Josh and Tyler

* begin working on new submittals
* warranty and review check-ins with all CEO’s

Adhoc Responsibilities

* CEO coaching.
* lender relationships
* customer care

Manager Responsibilities

Geremy and Vance

* policy exceptions (deposit longer than 72 hours, personal check, unusual deal)
* heat case customer care issues
* we owe decisions
* schedule changes
* call in notification

Geremy

* create monthly schedule
* approve action time
* payroll decisions
* customer refunds
* internal dispute resolution
* disciplinary actions - performance improvement plans