Lending Account Manager – New Heritage Capital

Company Overview

New Heritage Capital is the private lending arm of New Heritage Group, providing short-term, asset-backed financing for real estate investors. Built on integrity, excellence, and long-term stewardship, we go beyond funding deals — we build relationships that compound trust, opportunity, and impact.

Position Summary

The Lending Account Manager will be responsible for sourcing, nurturing, and closing new loan opportunities. This is a relationship-driven sales role with a focus on building a strong referral network within the real estate investment community. Ideal candidates are self-starters with a strong sales mindset, networking skills, and a good understanding of real estate investing.

Key Responsibilities

1. Business Development & Lead Generation

- Proactively source loan opportunities by:
    - Networking with real estate investors, wholesalers, agents, contractors, title companies, attorneys, and mortgage brokers.
    - Attending local real estate investor meetups, REIAs, open houses, and auctions.
    - Building relationships with repeat borrowers and referral partners.
- Prospect daily through calls, texts, emails, and social media outreach.
- Follow up consistently with warm leads and nurture long-term referral sources.
- Create and manage a personal pipeline of prospective borrowers.

2. Loan Intake & Structuring

- Qualify borrower and property information quickly to determine deal fit.
- Collect and review borrower documents (purchase contract, rehab budget, comps, title info, etc.).
- Work with underwriting to structure deals that meet both company guidelines and borrower needs.
- Prepare and present loan terms clearly to clients.

3. Deal Management

- Coordinate with title companies, attorneys, insurance providers, and the internal team to ensure smooth closings.
- Track deals through the pipeline and keep borrowers informed of progress.

- Ensure all required documentation is complete and accurate.

4. Marketing & Brand Building

- Represent the company at industry events, networking groups, and online communities.
- Post and engage on social media platforms to increase brand visibility.
- Collaborate with the marketing team to identify and target new borrower segments.

5. Reporting & CRM Management

- Maintain and update CRM with all leads, activities, and pipeline information.
- Track outreach numbers, referral sources, and conversion rates.
- Provide weekly activity and production reports.

Daily Activities & Expectations

- 40–60 outbound touches per day (calls, texts, emails, social DMs).
- Add a minimum of 5–10 new qualified leads to CRM weekly.
- Attend 1–2 local networking or investor events per week.
- Meet or exceed monthly loan origination volume goals.
- Maintain consistent follow-up cadence on all leads in the pipeline.

Requirements

- Proven sales experience in real estate, lending, mortgage, or related field.
- Strong understanding of real estate investment strategies (fix & flip, BRRRR, wholesale, bridge).
- Excellent communication and negotiation skills.
- Self-motivated, goal-oriented, and comfortable working independently.
- Familiarity with loan origination software or CRM systems is a plus.
- (Optional but helpful) NMLS license **not required** for private lending, but mortgage or real estate experience is highly valued.

Compensation

- Commission-based with competitive splits on funded loans.
- Bonuses for hitting production goals.
- Opportunity to grow into leadership roles as the company scales.

Ideal Candidate

The ideal candidate is a driven, relationship-oriented professional who thrives in a fast-paced, results-driven environment. You're naturally entrepreneurial, disciplined in follow-up, and confident communicating with everyone from first-time investors to seasoned developers. You take pride in doing what you say you'll do, representing New Heritage Capital with integrity, excellence, and purpose in every interaction.