



An Equal Opportunity Employer

POSITION TITLE: Loan Assistant

SUMMARY

Provide a high quality of client service in activities such as processing loan transactions, cross-selling bank services, and maintaining records. In addition, safeguard confidentiality and security of client and bank information.

TYPICAL DUTIES:

- Assist in maintaining loan files by inputting data pertinent to a consumer, commercial, mortgage and participation loan/s. Upload loan information to host system, as well as scan to loan document imaging system; in addition, link advantage accounts to new loans.
- Assist in servicing loans including processing items such as advances, payments, payoffs, insurance, etc. Keep up-to-date on ESCROW responsibilities. In addition, and when necessary, post online tickets.
- Order credit report on loan applicants and distribute to loan officers for their review.
- Cross sell bank services, including but not limited to: online banking, ATS, bill pay, etc. Refer clients to other bank departments for additional services.
- Assist in maintaining the accuracy/completeness of the loan collateral file by following up on insurance documentation and processing UCC findings as needed.
- Complete routine maintenance of CIF by completing address changes and routine file maintenance on loan customers.
- HMDA duties, including reporting and monitoring as designated by Loan Operations Manager.
- Willingness to attend and participate in ongoing training sessions
- Willingness to take on new responsibilities and challenges.
- Participate in bank and community activities.

EDUCATION & EXPERIENCE:

High school diploma or general education degree (GED) Computer skills/computer literacy necessary.

