



JOB TITLE

Loan Assistant

SUMMARY

Provides direct support to Loan Officers by performing loan file set up, retrieving documents and verifications needed for individual loans, providing customer service to client base, and other administrative and clerical duties as assigned.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Use of data entry on computers using MS Outlook, Excel and Word; specialty software - POINT and Encompass, and assist in new loan file set-ups.

Documentation follow up and tracking (contacting borrowers, title companies, real estate offices, appraisers, lenders, etc.).

Prepare loan application packages.

Prepares shipping labels and package drop off/pickup.

Answers incoming telephone calls, determines purpose of callers, and forwards calls to appropriate personnel or department.

Answers questions about organization and provides callers with address, directions, and other information.

Welcomes on-site visitors, assisting them with seating and beverages.

Receives, sorts, and routes mail, and maintains and routes publications.

Orders, receives, and maintains office supplies.

Creates and prints fax cover sheets, memos, correspondence, reports, and other documents when necessary.

Performs other clerical duties as needed, such as filing, photocopying, scanning and collating.

Other projects as assigned.

SKILLS

Strong interpersonal and customer service skills required, ability to work with diverse base of contacts (Loan Officers, clients, agents, lenders, title companies, etc.).

Detail-oriented individual with strong organizational skills.

Computer skills required for this position include intermediate/advanced MSWord, Outlook (e-mail), Excel, Calyx POINT and Encompass mortgage origination software.

Ability to work under pressure and meet stringent deadlines on a consistent basis.