

Title: Loan Assistant

Category: Full Time

Location: Robertsdale

### **Summary**

Provide support to assigned area by performing general administrative duties. Support one or more retail lenders to maximize loan production through the performance of loan related tasks and by assuming responsibility for key components of the Retail Loan Process.

### **Essential Duties**

- Prepare loan related correspondence, reports, forms, etc.
- Process and prepare loan documentation through Compliance One
- Establish and maintain files and records
- Answer telephones and handle walk-in inquiries, including but not limited to calls regarding collateral values, payoffs, and rate information
- Arrange and handle details related to expense reports, meetings, appointments, etc.
- Knowledge of Bank Secrecy Act and signs of suspicious activity
- Deal discreetly with confidential information
- Assist in solving problems and answering questions
- Review loan packages prior to and post-closing
- Be knowledgeable of compliance requirements related to consumer and commercial loans
- Clear documentation exceptions on behalf of assigned lender(s)
- Order research documents
- Provide additional sales and service support daily as determined by the Branch Manager
- Serve as back-up Customer Service Representative for the branch. Prepare new account paperwork, address changes, and other inquiries
- Assist customers in opening or revising deposit accounts

### **Position Requirements**

- High school graduate or equivalent
- 3 years of banking experience
- Excellent verbal and written communication skills
- Working knowledge of Microsoft Word, Excel and Outlook, with acceptable keyboarding skills
- Ability to operate office equipment (copier, fax, etc.)
- Ability to manage multiple tasks in an efficient manner
- Possess attention to detail and thorough follow through
- Effective interpersonal skills, which allow positive interaction with coworkers and clients
- Ability and willingness to learn and adapt as needs of the job change