

<b>Job title</b>	<i>Loan Operations Specialist I, II, III</i>
<b>Reports to</b>	<i>VP – Loan Operations Manager</i>

### **Job purpose**

This person is responsible for various administrative loan operations which assure that all back office loan activity is complete, accurate and timely. They serve as a resource for loan officers for assuring that all documentation is obtained, and a contact resource for loan customers.

### **Duties and responsibilities**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Provides best in class customer service with a “what can I do” approach to personal accountability
- Assure that any activity on loan accounts posts correctly, and correct if not posted correctly.
- Order / collect required documentation for loan files and follow up on missing items, serving as a resource to loan officers with questions or missing documentation
- Establish, maintain, and update files, databases, records, and/or other documents for internal reporting
- Compile documents for customer files and enter information into loan origination system for processing and validation
- Generate notices and communication with customers
- Order, review & index vendor work for various loan products as needed (flood, title report, AVM & Inspection)
- Schedule and prepare documents for closings
- File away new notes, review underwriting, track exceptions
- Follow the payoff check list
- Process escrow payments for property insurance and taxes
- Ensure customer privacy, security of files and appropriate staff access
- Other duties as assigned

### **Competencies**

- Communication Proficiency
- Discretion
- Organizational Skills
- Technical Capacity
- Time Management

### **Qualifications**

Required Education and Experience include:

- High school diploma or equivalent

Preferred Education and Experience include:

- Mortgage loan experience such as processing and preparing initial and closing packages

### **Working conditions**

This is a full-time, non-exempt position, regular hours from 8:30 am to 5:00 pm.

This job operates in a clerical office setting, and routinely uses standard office equipment such as computers, phones, photocopiers, scanners, currency counters, filing cabinets, and fax machines.

**Physical requirements**

This position requires manual dexterity, the ability to lift files and open filing cabinets. This position requires bending, stooping or standing as necessary.

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<b>Approved by:</b>	
<b>Date approved:</b>	
<b>Reviewed:</b>	<i>April 09, 2019</i>

