



## POSITION DESCRIPTION

**TITLE:** Collateral Solutions Client Coordinator  
**BUSINESS UNIT:** Commercial Loan Resources/Collateral Solutions  
**CLASSIFICATION:** Fulltime, Non-Exempt

### SUMMARY:

The Client Coordinator position is responsible for being the primary point of contact for our financial partners and providing outstanding customer service. This position assists with daily scheduling for the review teams and manages the engagement process for appraisal, environmental and third-party vendors. In addition, the role provides support for Collateral Solutions Team.

Accuracy and attention to detail are critical to the success of this position as this role requires a high degree of efficiency, problem solving skills, ability to work independently and to handle multiple deadlines. Primary clients include internal team, external lending partners and third-party vendors.

### REQUIRED QUALIFICATIONS:

**Education:** An Associate Degree from an accredited institution of higher learning OR

**Experience:** Minimum two years of business-related experience (prefer real estate, mortgage, banking, etc. with a proven track record in Microsoft Office and underwriting systems. Experience with appraisal engagement systems is a plus.

### ESSENTIAL RESPONSIBILITIES & DUTIES:

- Coordinate the exchange of information between Servion, lenders and third-party vendors via email/phone while providing outstanding customer service.
- Assist with scheduling daily workflow for Collateral & Evaluation teams.
- Processing of appraisal/environmental engagements.
  - Responsible for the accurate input of loan data into the commercial lending collateral pipeline as part of the loan creation process.
  - Correspondence with lenders regarding appraisal and environmental bids.
  - Engage, award and track appraisal and environmental reports.
- Collateral Solutions support role.
  - Process uploaded reports/invoices from third-party vendors and properly distribute to appropriate parties.
  - Other miscellaneous duties as assigned

## **OTHER DUTIES, KNOWLEDGE, SKILLS, ABILITIES**

### **Required:**

- Extensive experience with office technology including Microsoft Office Word, Excel, and Outlook.
- Communicates in a professional, clear and timely manner; actively listens and values others' input; writes in a clear and succinct manner.
- Organizes information accurately and effectively; juggles a variety of tasks throughout the day; manages deadlines; develops plan of action. Highly organized.
- Uses critical thinking and sound judgment to solve problems; asks questions and examines all useful resources.
- Ability to read and interpret documents to include procedure and instructional manuals and documents.
- Ability to write routine reports and correspondence.
- Ability to speak effectively to groups of customers and employees in a professional manner.
- Ability to apply common sense understanding to carry out instructions furnished in written, oral or diagram form.
- Ability to deal with a problem involving several variables with minimal supervision.

### **Preferred:**

- Experience working with commercial loan servicing software and familiarity with commercial loan structure.
- Navigates web-based systems with ease including placing and monitoring online orders from one or more sites daily.

### **General:**

- Must work the days and hours necessary to perform all assigned responsibilities and tasks. Must be available (especially during regular business hours) to communicate with employees, customers, managers and any other person or organization with whom interaction is required to accomplish work and company goals.
- Dependability a must. Attendance is extremely important for consistency within the department. Ability and willingness to work overtime hours as workload may warrant. Consistently at work and on time; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time; observes appropriate allotted breaks.
- Must maintain courteous, professional and effective working relationships with employees at all levels of the organization, customers, vendors and/or any other representatives of external organizations.
- Communicate information and state problems or challenges to be resolved in a clear, concise, courteous, nondiscriminatory and professional manner, and be able to provide clarification if necessary.
- Must be capable of adapting, with minimal or no advance notice, to changes in how business is conducted, and work is accomplished, with no diminishment in work performance.

- Actively participate in quarterly performance meetings; meet or exceed all performance metrics.
- Follows company policies and procedures.
- Perform other duties as required.

*This position description should not be construed to imply that any of the duties, responsibilities, or requirements outlined herein is exclusive. Employees are expected to execute any other additional assignments that may be specified. Furthermore, this position description does not represent a complete list of all the performance expectations and characteristics of individuals required to perform a job accurately. The company's management reserves the right to change this description from time to time as may be required.*

If these qualities describe you, submit your resume and cover letter to [jobs@myservion.com](mailto:jobs@myservion.com)