



## POSITION DESCRIPTION

**TITLE:** Commercial Loan Production Coordinator

**BUSINESS UNIT / DEPARTMENT:** Commercial Loan Resources

**CLASSIFICATION / STATUS:** Fulltime, Non-Exempt

### SUMMARY:

Will be responsible to maintain effective communication (liaison) with clients, internal staff and Chief Credit Officer (CCO) to ensure accurate assigning of work and exchange of information. Will assign work to analysts based upon a set of criteria approved by CCO. This position requires a high degree of self-motivation with the ability to meet deadlines and handle large volumes of work without error or omission.

### REQUIRED QUALIFICATIONS:

**Education:** Bachelor's degree in Business, Finance or Accounting or related field. A combination of education and experience may be substituted.

**Experience:** Knowledge of the documents necessary for underwriting commercial loans along with understanding of the process workflow for commercial loan transactions and a minimum of two years' experience within a commercial loan function.

### ESSENTIAL RESPONSIBILITIES & DUTIES:

- Grow and maintain a process for assignment workflow across all credit analysts based upon a set of criteria established developed by PC & CCO.
- Review loan packages to determine completeness for underwriting – both new loan requests and annual reviews.
- Work directly with Lenders and applicable third parties to process certain loan transactions from start to finish.
- Communication with clients is imperative in this position. Response time is expected within minutes of a client request where possible; however, no response time is allowed beyond 1 hour during business hours 8-5 daily.
- Coordinate assigning all new loan requests so that turnaround time expectations are met for each client.
- Coordinate assigning all annual reviews to meet deadlines as found in tickler system and/or deadlines imposed by the clients.
- Manage a reporting and tracking system to follow task assignments with reporting to the CCO.
- Be the backup to the daily and monthly invoicing for SCLRI team – work directly with Accounting and Lenders to make certain billing is completed accurately for each client.

- Work with the Operations Department as needed to correct and otherwise update the tickler list when found to be incorrect.
- Works with co-workers as a team to resolve any issues that arise. Take ownership of the situation and handle the request from the client in a timely manner.

#### **REQUIRED KNOWLEDGE, SKILLS, ABILITIES:**

- Strong verbal and written communication skills.
- Ability to work with a wide range of personalities in a courteous, effective and efficient manner.
- Ability to input data accurately and efficiently into computer software systems.
- Ability to work under the stress of maintaining the proper liaison between members, participants, Lender staff and vendors.
- Ability to attend accurately to many details in a timely manner.
- Ability to comprehend the consequences of various problem situations and to refer them to the appropriate people for resolution.
- Ability to resolve questions and problems with the supervisor and to manage personal workflow and meet deadlines.

#### **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.
- 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.

*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 interested in this position, please submit resume and cover letter to: [jobs@myservion.com](mailto:jobs@myservion.com)