



## POSITION DESCRIPTION

**TITLE:** Correspondent Coordinator

**BUSINESS UNIT:** Mortgage / Correspondent

**CLASSIFICATION:** Fulltime, Non-Exempt

**Servion, Inc.** is a credit union service organization (CUSO); not a credit union. We have over 50 owners and hundreds of retail partners. We've proudly held an outstanding reputation for service in our ever-evolving industry for over 30 years. We accomplish this with a focus on relationships. Our culture thrives on teamwork and cooperation.

### **SUMMARY:**

Correspondent Coordinators perform administrative tasks involving taking loan files from originator submission through delivery to post-closing. Maintain effective communication (liaison) with credit union partners, internal staff and Account Executives to ensure accurate data entry and exchange of information.

### **REQUIRED QUALIFICATIONS:**

**Education:** High school diploma.

**Experience:** Level I 1+ years in mortgage or credit union environment; Level II 2+ years in mortgage industry; Level III 3+ years in mortgage industry and familiarity with FHA/VA/USDA loans

### **ESSENTIAL RESPONSIBILITIES & DUTIES:**

#### **Entry Level**

- Take data from documents and manually type the data in to the software accurately.
- Understand and complete a residential loan application accurately.
- Review disclosures for accuracy and compliance as part of the submission process.
- Order and review flood certification.
- Order appraisals and title commitments.
- Order borrower identification verifications, tax transcript verifications.

#### **Intermediate Level (all above plus)**

- Enter data and navigate the FHA Connection and VA platform to obtain items needed based on channel and partner relationship.
- Sort electronic documents in a delegated submission and review that the items listed on the AUS have been provided. Ability to input the data in origination software to accurately match the AUS provided to ensure delivery to investors.

- Run AUS Findings for Desktop Underwriter and Guaranteed Underwriting Systems.

### **Senior Level (all above plus)**

- Resubmits a file to underwriting when conditions are received in. Including but not limited to review of documents to establish if they satisfy the underwriters condition and perform the administrative tasks required to ensure the underwriter is able to efficiently review the conditions.

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

#### **Required:**

- Familiarity with documents required for underwriting a mortgage loan including but not limited to borrower's income and asset statements, property appraisal, title work, and disclosures.
- Basic mathematic principles and ability to use calculator.
- Navigate various websites as needed for job duties.
- MS office and ability to type accurately at least 40WPM
- Exchange information and to report facts and technical information clearly and concisely.
- Attend accurately to many details in a timely manner.
- Follow direction that has been given from management.
- Comprehend the consequences of various problem situations and to refer them to the appropriate people for resolution.
- Manage personal work flow to meet deadlines.
- Gain basic knowledge of all Servion business units.
- Work overtime hours as requested.

#### **Preferred:**

- Previous customer service, data entry and analytical experience.

#### **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.
- Follows company policies and procedures.

*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)