

Loan Assistant/Processor

Title: **Loan Assistant/Processor**

Office: **Corporate position (Barron Branch)**

Reports to: **Lead Loan Processor**

Skills Required: Ability to multi-task and deal effectively with other employees and customers. Accuracy and attention to detail are required to fulfill job requirements. Basic knowledge of Microsoft Word and Excel along with satisfactory typing skills are necessary.

Job Summary: In accordance with policies, procedures, and regulations, assemble documents in preparation for loan closings, disburse loans, file security interest perfections in an accurate and timely manner, upload/input loans on to core system, assist loan officers and others as directed, and handle all necessary details related to loan servicing. Also, process all types of loan applications, establish loan files, order required documentation, prepare closing documents, check file maintenance, scan files, follow up on exceptions after closing, and complete other tasks as directed.

Primary Duties-Loan Assistant:

1. Assist as necessary prior to closing loan with loan papers and disbursements.
2. Prior to uploading the loan, review documents for signatures, upload loan and complete necessary file maintenance, disburse loan, record documents, scan/file documents and complete all other closing tasks.
3. Perform a variety of loan servicing tasks such as, filing, loan payments/payoffs, escrow payments, insurance, UCC continuations, satisfactions, maintain files, paid loans, and other tasks as directed.
5. Assist customers with questions on their accounts.
6. Assist loan officers as directed.
7. Maintain customer confidentiality and protect the reputation of the Bank.
8. Performs other task as directed as they relate to Bank functions.
9. Maintain compliance with Bank Secrecy Act/Anti-Money Laundering Policy of Procedures, and regulations related to the implementation of such procedures.
10. Maintain compliance with all internal policies, procedures and State/Federal regulations.

Additional Primary Duties-Loan Processor:

1. Process loan applications as required/directed.
2. Review checklist to meet documentation requirements and verify completeness for each loan.
3. Prepare loan file and closing documents on loan document system.
4. Verify mortgages, UCCs, and MVDs were accurately recorded.
5. Monitor and resolve exceptions needed to complete loan files.
6. Check loan file maintenance for accuracy and scan files in a timely manner.
7. Perform other tasks as requested by supervisor/management as they relate to Bank functions.