



JOB DESCRIPTION

Title: Loan Support Specialist (Mortgage/Commercial)

Department: Commercial

FLSA: Non-Exempt

Reports To: AVP Loan Operations Officer

Revised: September 2021

Position Summary

Under the direction of the AVP Loan Operations Officer, the Loan Support Specialists aid both Commercial and Mortgage Lenders by being responsible for preparing, processing, and maintaining loan documentation, data, and reports. The Loan Support Specialists work closely in a collaborative team environment to ensure both internal and external customers are completely satisfied. They are experts at multi-tasking and switching directions/tasks with ease. The position requires working directly with customers and other bank employees to solve problems and provide superior customer service.

Primary Duties and Responsibilities

The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Embraces the bank's core values of servant leadership, persistence, curiosity, growth and listening.
- Provide outstanding customer service servicing duties including but not limited to greeting customers, researching customer inquiries, fulfilling customer requests, and other customer needs to enhance retention.
- Accountable for driving a strong, customer focused culture and experience within the department, branch, and bank.
- Prepares and collects all necessary documentation to assure loan files are complete. This includes but is not limited to: appraisals, title commitments, flood determinations, credit bureaus, tax transcripts, verifications, payoffs and insurance. Ensures all adequate documentation is in order prior to loan closing. Review loan documents for accuracy and completeness.
- Processes a variety of commercial and mortgage loans including preparing loan documents, completing post-closing booking, filing and perfection of liens and file maintenance. Communicate with loan originator on deadlines and outstanding documentation.
- Accurately input loans and customer information into Laser Pro system.
- Process loan: edits, payments, advances, paid loans, participations, and maintenance
- Maintain the document/insurance tickler tracking system
- Monitor and prepare daily, monthly, quarterly and annual reports
- Sorts, preps, and scans physical loan documents into digital copies. Reviews documents for accuracy and verifies image quality. Indexes scanned loan documents to the appropriate loan folder to ensure files contain the most recent information.
- Completes and/or assists with projects and audits for the Loan Operations department Assists in development of departmental processes and procedures to ensure compliance with current banking regulations
- Consistently meet deadlines including commitment due dates, rate expirations, and closing dates and times.
- Maintain knowledge of all loan types, regulatory requirements and internal policies and procedures
- Follows all bank policies, including but not limited to the Bank's Information and Security policy

Additional Duties and Responsibilities

- Knowledge of bank products and services
- Assists in other departments as necessary to fulfill the needs of the Bank
- Maintains up to date knowledge and develop professionally on a continuing basis. Participate in internal and external training and development opportunities as required
- Performs other duties as assigned or requested



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Work Relationship and Scope:

Reports directly to the AVP Loan Operations Officer. Works closely with all bank employees and outside vendors. Works regularly with confidential Bank and customer information.

Measures of Performance

Quality, accuracy, reliability, friendliness, thoroughness and timeliness of services provided to internal and external customers; adherence to banking regulations and accepted audit procedures; ability to earn the trust and respect of employees and co-workers; effectively communicates and develops good working relationships with co-workers; professional workplace appearance and conduct; keeps Bank, customer, and employee information confidential; participates in training and appropriate professional development; reliability in reporting to work regularly and on time; understands and adheres to Bank policies and procedures; informs customers and potential customers of additional Bank services when appropriate.

Knowledge, Skills and Abilities Required

Requires an high school diploma and at least one year of commercial banking experience; or a combination of education and experience. Proven customer service experience. Knowledge of commercial products and services, bank rules, regulations, policies and procedures, loan application and documentation preferred. Must possess: courteous and professional customer service attitude; technical ability to input and retrieve computerized information; excellent communication skills for interacting professionally with employees and customers; ability to maintain the integrity of highly confidential customer and Bank information; ability to deal effectively with time pressures and stress that can change hourly depending on level of customer activity; effective problem-solving skills.

Working Conditions

Work is performed primarily in a pleasant office environment with minimal chance for personal injury. Occasionally, work may be performed remotely or offsite location. Prolonged sitting and mental and visual concentration for computer usage required. Must be able to lift and move up between 20 – 50 pounds of office supplies and equipment. Some bending, turning, and twisting to file and retrieve documents. Hours worked are generally during normal business hours, with occasional after hour activities in support of the bank.

Employee Acknowledgement

This job description describes the general nature and level of work performed by employee assigned to this position. It is not to be construed as an exhaustive statement of duties, responsibilities, or requirement. Management reserves the right to change this position at any time according to business needs or to provide reasonable accommodations to qualified individuals with disabilities. In addition, the employee may be required to perform other job-related duties as requested by the supervisor. American National Bank Fox Cities is an Equal Opportunity Employer that does not discriminate on the basis of actual or perceived race, creed, color, religion, alienage or national origin, ancestry, citizenship status, age, disability or handicap, sex, marital status, veteran status, sexual orientation, genetic information, arrest record, or any other characteristic protected by applicable federal, state or local laws.

Employee Name

Employee Signature

Date



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Supervisor Name

Supervisor Signature

Date