

COMMUNITY FIRST FUND TEAM MEMBER PROFILE

Date: 09/2020

Name: Vacant

Position/Title: Affinity Group Lending Loan Support Specialist

Department: Affinity Group Lending Reports To: Kersy Azocar

Salary Band: Core Operations

CHARACTERISTICS

- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Ethical
- Goal Oriented
- Inclusive
- Cooperative
- Conscientious
- Outgoing
- Performs well in a fast paced work environment
- Supportive
- Positive
- Customer focused
- Commitment to ongoing learning

SKILLS

- Bilingual, Spanish speaking (must be proficient).
- Proficiency in Microsoft Products; with strong skills in Excel.
- Capacity to learn departmental software systems and databases, including but not limited to Customer Relationship Management software, On-line application (SPARK), The Exceptional Assistant (TEA) and cloud based programs like Microsoft 365 and Power BI.
- The ability to maintain a high degree of accuracy and attention to detail.
- Ability to work independently.
- Strong written and verbal communication skills.
- Strong analytical skills.
- Strong time management skills.
- Ability to grasp general accounting and financial concepts.
- Ability to work effectively with racially and socially diverse individuals.

EXPERIENCE

- Associate degree in a relevant business and financial field
- Two years of financial service preferred.
- Customer service experience including use of a customer service data base.
- Experience in loan administration and collections.



ROLE: The Lending Support Specialist is responsible for administrative review of all documentation for accuracy and completeness in accordance with lending policy of the Affinity Group Lending department. Is responsible for accurately reporting data on the program's outcomes and impact. Conducts customer service and collection calls, data entry, and coordinates loan closings with Lenders and prepares post-closing list.

RESPONSIBILITIES:

1. Loan Closing
2. Post Loan Closing
3. Program Support & Administration
4. Individual, team and company participation

EXPECTATIONS:

1. Loan Closing
 - a. Create pre-closing list
 - b. Pull CAVIRS for each SBA borrower
 - c. Complete credit memo
 - d. Coordinate loan check requests
 - e. Print closing documents
 - f. Assist lender at closing and assure that the note is notarized
 - g. Follow-up with client for post-closing commitments
 - h. Update indicators in TEA
 - i. Dismantle paid off files and archive them
 - j. Ensure all required documents are in the file prior to closing
 - k. Enter SBA loans in MPERS
2. Post Loan Closing
 - a. Pull credit reports to be included in each client file
 - b. Compile credit report data and update TEA and client file
 - c. Review client's loan loss escrow and refund appropriately
 - d. Collect in-kind donation format for SBA reporting
 - e. Send stamped consumer notes with paid in full letter to consumer borrowers
 - f. Perform quality control on loans closed and information entered into TEA
 - g. Send withdraw or dropped letters to clients
 - h. Assist in compiling exit surveys
3. Program Support & Administration
 - a. Perform quality control on a monthly basis to ensure loans match
 - b. Assist with audits as directed
 - c. Assist with compiling support documents for reporting
 - d. Assist in tracking program outcomes as directed
 - e. Assist with setting up and conducting site visits
 - f. Contact speakers as directed

- g. Assist with the identification of off-site venues
 - h. Assist with potential client tracking
4. Individual, team, and company participation
- a. Quarterly coaching sessions and annual review meeting
 - b. Department meetings
 - c. Opportunities Meeting, Quarterly Business Meeting
 - d. Participate in training, assessments and surveys as directed
 - e. Special events attendance & support

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.
- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a wide geographic area is required approximately 25% of the time. Employee must have transportation in order to travel outside of the office for meetings, conferences, client visits and other job-related commitments.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. The team member profile does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.