

# **Connection Bank**

## **Position Description for Loan Support Specialist**

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Department: Loan Department  
Reports to: Supervising Loan Coordinator  
Supervises: N/A  
FLSA: Nonexempt

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### **Summary**

The Loan Support Specialist supports and assists day to day activities of the Loan Department staff. While performing these duties, the incumbent must strive to live our core values by embracing a “can do attitude”, demonstrating our brand of customer service “on steroids”, and protecting our customers’ security and privacy.

### **Essential Duties and Responsibilities**

- Performs regular administrative support duties, including providing telephone support, screening calls, greeting and screening visitors, and assisting customers and staff with routine inquiries.
- Performs clerical duties for loan department such as processing loan payments or fees, processing changes of addresses, distributing daily loan reports.
- Files all necessary statements, deeds, titles, and other legal documents with appropriate state and federal entities.
- Maintains loan files and records in consistent and orderly fashion including computer system records.
- Tears down paid loan files and distributes appropriate documents in a timely fashion.
- Assures the accuracy of all posted loan entries.
- Identifies and reconciles all unposted and rejected items.
- Ensures all loans have insurance with accurate mortgagee and/or loss payee, force places insurance for loans when insurance is not in place, processes insurance payments for escrowed accounts.
- Assists in preparation of loan documents for installment, mortgage and commercial loans, as requested.
- Advocates the benefits of products and services to promote customer enthusiasm and engagement.
- Completes assigned compliance training.
- Performs other duties as required or assigned.

### **Skills and Abilities**

- Promotes Connection Bank core values.
- Projects a positive image of the bank to all internal and external customers.
- Demonstrates the ability to hold confidential information and displays honesty and high ethical standards.
- Strives for high customer satisfaction, is helpful, pleasant, approachable, and team oriented.

- Knowledgeable of bank operations, policies, procedures, products, and services.
- Able to use relevant information and individual judgment to determine whether events or processes comply with laws, regulations, and/or standards.
- Develops constructive and cooperative working relationships with others and maintains them over time.
- Exceptional oral, written, and interpersonal communication skills with the ability to apply common sense while performing work.
- Excellent organizational and time management skills.
- Proficient in computer operations with working knowledge of Microsoft products and the ability to learn bank specific programs.
- Typing skills to meet production needs of the position.
- Current driver's license and a vehicle with appropriate insurance coverage if required to drive in the course of performing assigned duties and responsibilities.
- Ability to work with minimal supervision while performing duties.

## **Physical Demands**

The person in this position must be able to:

- remain in a stationary position for approximately 90% of the day.
- move about inside the office to access file cabinets, office machinery, etc.
- operate a computer and other office productivity machinery, such as an adding machine, copy machine, printer, postage machine, branch capture scanner, etc.
- occasionally ascend/descend a ladder to service files.
- lift and/or move up to 20 pounds.

This description reflects management's assignment of essential functions, it does not proscribe or restrict the tasks that may be assigned and is subject to change at any time. This job description does not constitute an employment agreement between the Bank and employee and is subject to change by the employer as the need of the Bank and requirements of the position change.