



POSITION DESCRIPTION

Position Title:	Loan Support Specialist	Hours:	40 Hours (Mon- Fri) 8 AM – 5 PM
Reports To:	Loan Operations Manager	FLSA Status:	Non-Exempt
Department:	Loans- Tacoma Office		

POSITION SUMMARY:

Assist in all areas of loan operations. Work with the lending staff to monitor credit relationships, assist with daily customer service needs, and ensure compliance with regulatory requirements related to lending. Work with loan officers and the Loan Operations Department to obtain loan documentation, ensure all collateral is adequately perfected, and manage the tickler system for missing items. Ensure loan customers receive high quality service and that payments and advances are handled appropriately.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Assure compliance with all Bank policies and procedures as well as state and federal banking regulations, as applicable
- Follow all BSA/AML/OFAC guidelines and complete annual training as assigned
- Be the primary support contact for loan clients and assist loan officers in order to achieve the Bank’s objectives and ensure customer satisfaction
- Responsible for preparing credit approval documentation forms and for calculating related debt levels as well as depository balances
- Review, manage and make recommendations in the daily tracking of collateral and financial statement items
- Responsible for coordinating loan documentation on new and existing credit requests
- Ensure loan files and records are maintained in a complete and accurate manner
- Maintain working knowledge of all loan and deposit related regulatory compliance and operational policies and procedures
- Ensure that appropriate internal controls are maintained
- Exercise an appropriate level of courtesy, tact, and professional communications in dealing with others
- Contribute toward effective team problem solving with staff, peers and management
- Perform other duties as assigned

REQUIRED SKILLS

- At least one year of experience in a loan support and/or loan documentation role
- Working knowledge of loan and deposit related compliance regulations
- A self-starter with initiative and desire to learn
- Detail-oriented with high organizational skills

- Works under limited supervision and exercises good judgement within guidelines
- Ability to work collaboratively to reach mutual goals
- Ability to communicate clearly, effectively, and professionally, both verbally and in writing
- Ability to learn and follow written procedures
- Ability to use or learn Microsoft Word, Excel, and Outlook
- Treats people with respect; works ethically and with integrity; accepts responsibility for own actions

WORK ENVIRONMENT

- Must be able to remain in a stationary position for long periods
- Must be able to effectively communicate and exchange accurate information
- Must be able to work in a branch environment with moderate noise levels and with frequent employee/customer contact and interruptions during the day

QUALIFICATIONS

- High school graduate or GED required

This job description is subject to change at any time.