THE STEPHENSON National Bank & Trust

Loan Processor/Administrative Assistant

LOCATION:
Green Bay office

SUMMARY:
The Green Bay LPO Administrative Assistant position provides administrative, sales, and relationship management support to Loan Officers. The position has direct contact with the Lending Department clients, providing them with customer service both independently and under the direction of the Loan Officers. This position would also have direct contact with retail clients through walk-in traffic in the Green Bay LPO.

MAJOR ACCOUNTABILITIES:
Information Processing - Prepare new loan and renewal documents ensuring accuracy, completeness, and compliance with policies and procedures. Process closed loans and perform file maintenance. Check back new/renewed loans and payments entered on the system. Compile data into reports and balance accounts as needed. Effectively communicate loan status and issues with Loan Officer or Supervisor. Follow up on submitted loans and/or pending loans.

Transaction Processing - Apply payments on loans including business, mortgage, installment, and escrows accurately and efficiently. Promptly disburse loan proceeds as required.

Client Relationship Management Support – Responsible for providing administrative support for loan officer(s) including fielding/understanding client questions and requests. Conduct research and problem solve these requests to provide recommendations. Includes ability to handle routine client account functions independently, accurately, and timely, utilizing sound judgment in determining issues that require loan officer input.

Administrative Support – Prepare loan files and scan documents per procedures. Support loan officer(s) in updating Salesforce with daily activity and notes from meetings. Assist with completion of forms and file documentation including follow-through on outstanding items. Process and sort mail for the location. Create correspondence related to loan origination, processing, servicing, and closing activities. Assist in the development of written policies and procedures.

Customer Relationship Development - Greet and receive customer walk-ins through the secured LPO door, by phone, or by electronic communications. Assist customers with their inquiries and assess their financial needs. Using the RSU to assist clients with loan payments and deposits that are handled through branching offices. Direct customers to the appropriate departments as deemed necessary.

QUALIFICATIONS:
High school graduate, with an associate degree in a relevant field preferred. Have excellent customer service skills, PC skills, high attention to detail, and basic knowledge of lending. Ability to work closely as part of a team. Good communication skills and excellent listening skills required. Ability to carry out directions in a thorough, accurate, and timely fashion. Ability to handle and prioritize multiple tasks.

APPLICATION PROCESS:
Apply in person, at any of our locations, or online at www.snbt.com/Careers. Resumes may be sent to employment@snbt.com.

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