



Loan Operations Assistant

Position Title: Loan Operations Assistant	Prepared By: Taylor Drakeford		Date: 07/08/2020
	Approved By: Allen Upchurch		
	EEOC :	FLSA status: Non-exempt	Salary Range: Pending
Department: Credit Administration			
Reports to: Retail Credit Administrator			

JOB SUMMARY:

Performs a variety of support duties related to the lending function within the Credit Union.

PRIMARY RESPONSIBILITIES:

1. Prepare the necessary documents for filing credit life, credit disability, and GAP claims.
2. Prepare, process, and assist with MV1s and UCCs for title and lien perfection.
3. Prepare and process deed cancellations, subordinations, and vehicle lien releases.
4. Prepare and process loan payoffs.
5. Assist members and employees with basic questions regarding lending services.
6. Review loans for quality control (accurate interest rate, required signatures, proper documentation, HYLS, underwriting guidelines, etc.).
7. Prepare loan packets for committee meetings, audits, examinations, or when otherwise requested.
8. Prepare and distribute new and paid out loan follow-up correspondence.
9. Track and perform monthly reconciliation for Open Lending.
10. Under the direction of management, maintain rate and other system changes.
11. Assist with vendor communication, as needed.
12. Mail members' insurance cancellation notices to Allied on a weekly basis.
13. Cross-sell credit union services and products.
14. Prepare reports as requested by Management.
15. Respond to members' requests, problems, and complaints, and/or direct them to the proper person for specific information and assistance.
16. Respond to all internal and external voicemails and emails in a timely manner, not to exceed end of day timeframe.
17. Notate all contact and attempts to contact on members' accounts.
18. Perform account research for resolution of member questions and/or concerns.
19. Represent the credit union to members in a courteous and professional manner, and provide prompt, efficient and accurate service in the processing of transactions.
20. Establish/maintain interdepartmental relationships to ensure proper account maintenance/resolution.
21. Assist Financial Service Officers when needed.
22. Assist in all other areas as needed.
23. Other duties as required.

JOB REQUIREMENTS:

Education and Experience:

- High School graduate; some secondary education (preferred)
- Member Service or Lending Experience (preferred)

Knowledge and Skills:

- Good interpersonal skills



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- Computer skills, (MS Word or Word Perfect, Excel).
- Organization and problem-solving skills
- Time Management skills, and the ability to meet deadlines.
- Ability to work independently without direct supervision
- Self-directed with excellent judgment
- Strong written and verbal skills

Physical and other job requirements:

- Flexible hours and some Saturdays
- Light lifting
- Georgia License required
- Notary Eligibility required

Please submit cover letter along with resume to Taylor Drakeford at tdrakeford@cuatlanta.org at your earliest convenience.