

Job Title Business/Branch Loan Fulfillment Specialist

Short Description Jax Federal Credit Union is seeking a Business/Branch Loan Fulfillment Specialist to serve as the primary support representative for loans originating from the business loan originator and branches for processing and funding of new loan applications. He/she must maintain extensive knowledge of all products and services. Must be able to efficiently review loan applications, collect any necessary loan documentation to include power of attorney forms, balance transfer forms and the like. Prepare and deliver closing documentation and loan funding for commercial and consumer loans. He/she will work with our partner company LUCRO to ensure proper commercial loan documentation is obtained and closing documents are generated and delivered to the business loan originator. Other fulfillment to include the issuance of ancillary products such as Credit Life and Disability, issuing GAP and MRC, and any other required post-closing documents. Compliance and quality assurance standards should be met with a high percentage of accuracy.

Full Description Jax Federal Credit Union is seeking a Business/Branch Loan Fulfillment Specialist to serve as the primary support representative for loans originating from the business loan originator and branches for processing and funding of new loan applications. He/she must maintain extensive knowledge of all products and services. Must be able to efficiently review loan applications, collect any necessary loan documentation to include power of attorney forms, balance transfer forms and the like. Prepare and deliver closing documentation and loan funding for commercial and consumer loans. He/she will work with our partner company LUCRO to ensure proper commercial loan documentation is obtained and closing documents are generated and delivered to the business loan originator. Other fulfillment to include the issuance of ancillary products such as Credit Life and Disability, issuing GAP and MRC, and any other required post-closing documents. Compliance and quality assurance standards should be met with a high percentage of accuracy.

Location: Park Street Building, 562 Park Street, Jacksonville, FL 32204

Status: Full-time (approximately 40 hours per week)

Major Duties and Responsibilities:

1. Maintain a high level of accuracy which is necessary for compliance and quality assurance standards for the credit union's lending guidelines.
2. Obtain necessary commercial loan documentation for underwriting review, preparing credit memo and collateral evaluation for review by the business loan committee.
3. Review commercial loan documentation to ensure accuracy of the information prior to closing, and ensure supporting documentation

conforms to loan approval policy.

4. Communicate frequently during the loan process with the business member.
5. Responsible for acquiring and clearing any loan officer stipulations prior to and after closing; to include the collection of any closing or post-closing documents.
6. Collect any necessary closing documents and coordinate electronic closing activities with external members. Prepare closed-end and open-end consumer loan document packages for electronic delivery to members. Coordinate and communicate closing expectations with members.
7. Close and fund all types of consumer loans for the retail branches and ensure loans are properly funded on the host system.
8. Be proficient in offering additional products and services such as Credit Life, Credit Disability, GAP, MRC, deposit accounts, automatic payments, other loan and mortgage products, etc., to enhance the relationship with the member.
9. Assist in handling member's concerns regarding closing or post-closing items.
10. Answer the Lending Operations hotline within the established time frames. Serve as a subject matter expert for new loan applications and loan funding.
11. Resolve assigned problem resolution issues promptly.
12. Performs other duties as assigned.

Knowledge & Skills

Experience:

6 months to two years of similar or related experience.

Education/Certifications/Licenses:

A high school education or GED.

Interpersonal Skills:

A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves personal contact with others and/or is usually of a personal or sensitive nature. Good independent worker whom is detail minded a member service oriented.

Other Skills, Technology and Equipment:

This job requires strong technical skills to include computer aptitude. PC Skill Level: Strong technical skills to include Intermediate to advanced computer proficiency, Intermediate level experience using MS Office Suite (Word/Excel).

Telephone Etiquette: Good listening and strong consultative sales skills.

Accuracy: Strong attention to detail.

Ability to follow policies and procedures.

Ability to research, find and apply answers to complex lending questions.

Demonstrated proficiency with mathematics.

ADA Requirements

Physical Requirements:

While performing the duties of this job, the employee is regularly required to use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk; sit; climb or balance and stoop, kneel, crouch, or crawl.

The employee must occasionally lift/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.

Working Conditions:

The noise level in the work environment is usually high.

Mental and/or Emotional Requirements:

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines/requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Acknowledgement

Nothing in this position description restricts management's right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job description is not a contract and should not be construed as a guarantee of employment for any specific period of time.

We are an Equal Opportunity Employer and do not discriminate against employees or applicants based on race, color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

Education	A high school education or GED.
Additional Comments	To apply online, please visit: https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=9a07bc15-a98c-4ef1-901a-8cb49f5ad6b8&cclid=19000101_000001&jobId=344183&source=C2&lang=en_US
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Expiration Date	11/20/2020