



**Position:** Lender Liaison

---

**Department:** Administration

**Reports To:** Administration

**FLSA:** Exempt

**Effective Date:**

**Revised Date:**

---

**POSITION SUMMARY:**

This position is primarily responsible for providing administrative and operational support to Relationship Managers in the Commercial Segment. This support includes the delivery of customer service at the highest levels, the performance of research and resolution of client issues, and the administration of loan documentation and portfolio reporting.

**ESSENTIAL DUTIES:**

- Provides support to Relationship Managers by assisting in the fostering of customer relationships through the processing of transactions, renewing loans, scheduling closings, resolving account/customer issues and providing various other administrative support.
- Works closely with Relationship Managers to assist with obtaining financial data, drafting letters and agreements, clearing exceptions, and obtaining collateral documentation. Coordinates with CPA's, attorneys, insurance agents, etc. of assigned clients to resolve specific exceptions and transactional issues.
- Coordinates the preparation of required loan documentation via worksheets; reviews loan documentation; coordinates execution of loan documents; ensures all pertinent loan documentation is imaged accurately and timely into the correct file type within the company's official imaging system repository; coordinates booking of renewal loan documents; clears loan exceptions.
- Serves as a liaison between the Relationship Manager and Lending Services during document preparation. Coordinates document workflow as appropriate.
- Responsible for the monitoring and maintenance of multiple reports; keeps Relationship Managers apprised of any issues/problems that may arise and need attention.
- Assists Relationship Managers in managing the deposit relationship and associated services, i.e. wires, account set up, NSF management, approvals, signatures, etc. Assist clients with draws, transfers and loan payments with appropriate authorization.

**MARGINAL DUTIES:**

- Review and approve all new internet banking applications
- Train customers and handle set up of Cash Management
- Review debit card reports
- Set up internal auto transfers

**KNOWLEDGE, SKILLS, AND ABILITIES:**

- 5-7 years of related support experience; preferably in a financial institution
- Basic knowledge of financial statements
- Ability to learn loan documentation processes and systems
- High School diploma or GED; Associate's degree preferred
- Proficient in the Microsoft Office Suite.
- Effective oral and written communication skills
- Effective organizational and administrative skills
- Excellent customer services skills
- Professional appearance and demeanor
- In-depth knowledge of all bank deposit products and polices
- Basic knowledge of loan products
- Ability to work in a fast-paced environment
- Ability to work well under pressure
- High degree of accuracy
- Knowledge of various federal regulations including Bank Secrecy Act, Community Reinvestment Act, Americans with Disabilities Act, Right to Financial Privacy Act, Gramm-Leach Biley Act, Regulation E and teller roles and responsibilities relating to each act.

**SUPERVISOR RESPONSIBILITIES:**

- None

**SUPERVISION RECEIVED:**

- Works under the general supervision of the Chief Loan Officer

**WORKING CONDITIONS:**

- This position operates in a professional office environment.
- This is a full-time position (40 hours/week)
- Overtime may be required
- Travel may be required

**PHYSICAL REQUIREMENTS:**

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to satisfactorily perform these essential functions without causing undue hardship for the employer.

While performing the duties of this job, the employee is required to remain in a stationary position for long periods of time and must frequently move about the office. The employee must constantly operate a computer and other office equipment such as phones, keyboards, printers, and copiers. The employee is regularly required to communicate with others via phone, email, etc. Occasionally, the employee is required to move up to 10 pounds and may, at times, be required to move up to 20 pounds.