



Department: Lending

Job Title: Commercial Banking Relationship Specialist

Reports To: Lending Core Administrator

JOB SUMMARY

This position is primarily responsible for performing lending duties to provide customer satisfaction in the lending process and meet closing deadlines / regulatory guidelines. This position provides administrative and other support to the Lending Team and Business Banking Team.

CORE VALUES

- **Customer Experience** – Be a trusted advisor while providing exceptional customer service in a welcoming environment.
 - **Continued Growth** – Continually evolve with technology and our customers' needs.
 - **Collaboration** – Success built through teamwork, where each person contributes their strengths and works diligently to achieve a collective goal.
 - **Community** – Make an impact, strive for improvement, and be involved.
 - **Hard Working** – Be enthusiastic, energetic, and tenacious while maintaining a harmonious balance between work and personal lives.
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ESSENTIAL FUNCTIONS

Essential Duties and Responsibilities include the following. Other duties may be assigned to meet business needs.

- Review loan applications for completeness and accuracy, ensuring all required information is provided.
- Maintain organized electronic files and ensure that all documentation is properly stored and accessible.
- Communicate regularly with loan officers, underwriters, and borrowers to provide updates on loan applications status.
- Works closely with the Business Banking Team providing support with new and existing customers.
- Ensure all loan applications and documentation adhere to regulatory and bank-specific guidelines.
- Stay up to date on industry regulations and compliance requirements.
- Collaborate with other members of the loan processing team to expedite loan approvals.
- Reviews daily loan notices and contacts customers about payments.
- Assist in preparing loan files for underwriting and closing.



EDUCATION, QUALIFICATIONS & TRAINING

- High School Diploma or GED required.
 - Customer service, and computer experience strongly preferred.
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PERFORMANCE EXPECTATIONS

- Excellent attention to detail, time management and organizational skills as well as verbal and written communication skills.
 - Ability to multi-task.
 - Must be discreet and trustworthy to hold confidential information.
 - Works in unity with people (internal and external).
 - Strong work ethic.
 - Work cooperatively with and maintain effective communication and working relationship with customers, co-workers, and manager.
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TOOLS & EQUIPMENT

- Must be able to navigate and efficiently operate standard office equipment such as computers.
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WORKING CONDITIONS & SPECIAL REQUIREMENTS

- Must be able to stand for indeterminate amounts of time while assisting customers.
 - Work is mainly performed under general office conditions in a retail-banking establishment.
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