



Mortgage Loan Documentation Specialist

JOB SUMMARY

This position is primarily responsible for independently preparing mortgage loan documentation while serving as a resource for lenders and support staff.

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.

- Manage mortgage loan documentation from application through closing, funding, and booking.
- Prepare, review, and process loan documentation to ensure accuracy, completeness, and compliance with loan terms, underwriting standards, and regulatory requirements.
- Coordinate loan closings, funding, renewals, modifications, and rate changes.
- Review business entity and legal documentation to verify borrower authority, ownership, and signing capacity.
- Ensure proper collateral perfection through title work, liens, ICC filings, security interests, and related documentation.
- Prepare and review specialized documentation for construction, SBA, participation, and complex mortgage loans.
- Monitor and resolve documentation and collateral exceptions.
- Process escrow cancellations and maintain accurate loan records within document management systems.
- Provide support to lenders, borrowers, attorneys, title companies, and other third parties throughout the loan process.

EDUCATION, QUALIFICATIONS & TRAINING

- High-school diploma required.
 - 3-5 years documentation experience.
 - Experience with customer service, lending, loan processing, or sales is preferred.
 - Fluent in broad level banking concepts and workflows (lending, deposit, operations, systems) desirable.
 - Strong loan documentation software proficiency.
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PERFORMANCE EXPECTATIONS

- Complete all mandatory training on time.
 - Be involved in the community to emphasize our core values.
 - Possess excellent attention to detail, time management and organizational skills, and ability to multitask, as well as verbal and written communication skills.
 - Must be discreet and trustworthy to hold confidential information.
 - Work cooperatively with and maintain effective communication and working relationships with customers, co-workers, and managers.
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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

- Work is performed under general office conditions in a retail-banking establishment with the ability to work remotely with the approval of HR.
- Willing and able to work overtime and travel, as necessary.
- Must be flexible and demonstrate the ability to adapt to new job locations and reassignments as directed.
- Must observe safety and security policies and procedures at the branch.