**POSITION PURPOSE:**

To manage the calendar, lead tracker, and keep the Team Leader organized.

**PRIMARY DUTIES/RESPONSIBILITIES:**

* Set all appointments for Team Leader.
* Keep Team Leader on track with calls and schedule.
* Schedule events for Team Leader to attend.
* Schedule and plan monthly lunch and learn for Team Leader and real estate agents.
* Answer all incoming phone calls.
* Add all leads to lead tracker.
* Weekly contact with leads/applications in database.
* Give borrower a verbal list of what to bring and directions.
* Email confirmation of appointment to agent, borrower, and Team Leader.
* Update data base with closed loans.
* Take care of Birthday Program/VIP List.
* Schedule, plan, and execute monthly Happy Hours.
* Provide exceptional customer service to both internal and external customers.
* Must be able to communicate effectively, get along with co-workers and deal with colleagues effectively and professionally.
* Practices branch security procedures and protects customer confidentiality and privacy.
* May perform additional duties as necessary to keep the Bank operating efficiently and effectively

**EDUCATIONS AND OR EXPERIENCE:**

High School diploma or general education degree (GED) is required.

**SKILL/KNOWLEDGE/SPECIAL REQUIREMENTS:**

* Professional appearance and attitude are a must.
* Must have knowledge of credit analysis, credit policy/procedures, real estate (business/personal) lending, problem loan administration, financial budgeting and planning, banking rules and regulations and bank products offered.
* Computer knowledge and the ability to learn various software programs is a must.
* Learn functionality of Encompass.
* Attention to detail while preparing and proofing loan documents, establishing priorities and meeting deadlines is required.
* Must be able to multi-task, be organized and work under stress and pressure.
* Must be dependable, trustworthy and maintain confidentiality.
* Good verbal and written communication skills.
* This person is required to represent and promote a positive image of the Bank in the community through involvement and/or participation in the community, civic, and charitable organizations and agencies.
* Ability to effectively present information and respond to questions from management and support staff.
* Ability to communicate and interact effectively and professionally with internal and external contacts including processors, underwriters, management, staff, realtors’, and vendors.
* Must have the means to travel to customers’ home or office and to any offsite locations, such as a title company