**POSITION PURPOSE:**

To assist the Mortgage Banker once a Purchase Agreement is in force, deliver service contract to close and manage the Pipeline.

**PRIMARY DUTIES/RESPONSIBILITIES:**

* Lock loan terms.
* Send disclosures and updated needs list.
* Conduct quality control review once final paperwork is received.
* Keep Mortgage Banker on track with new Real Estate agents.
* Update calls to clients as well as a written updates.
* Attend closings if the Mortgage Banker can’t.
* Send Closing Disclosure (CD) for client review and signature(s) to meet Tila/Respa Integrated Disclosure (TRID) guidelines.
* Order disclosures.
* Order appraisals.
* Advise Mortgage Banker if there are any loans that need help or may not close on time.
* Weekly Loan Partner Reporting to meet milestone process expectation.
* Prep and manage Real Estate Agent list.
* 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.
* 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.