

POSITION DESCRIPTION

POSITION TITLE: Loan Set Up Specialist

GRADE: 12

REPORTS TO:

FLSA: Non-Exempt

POSITION OVERVIEW: This position will assure the proper data and document set up per loan file in order to achieve efficiency in loan flow.

ESSENTIAL DUTIES and RESPONSIBILITIES, *includes the following responsibilities, but not limited to:*

- ◆ Reviews 1003 for accuracy of data fields.
- ◆ Reviews file documentation against the complete file checklist.
- ◆ Completes required fields in Data Trac per Loan Set Up checklist.
- ◆ Images documents in new loan submissions
- ◆ Prepares Initial disclosures
- ◆ Inputs data as changes occur and keeps running notes in Data Trac
- ◆ Orders 4506 verifications from IRS
- ◆ Orders SSN verifications via vendor
- ◆ Completes all other required tasks on new loan set up checklist
- ◆ Maintains file integrity at all times.
- ◆ Communicates to appropriate branch when needed.
- ◆ Maintains notes in Data Trac to properly track the file.
- ◆ Completes 6 - 8 files per day minimum.

SUPERVISORY RESPONSIBILITIES:

Direct Reports: N/A

PHYSICAL and ENVIRONMENTAL CONDITIONS

Office environment, equipment and tasks, including work at a computer terminal which requires repetitive keyboarding and data entry. This position requires partial sitting and walking throughout the day. Employee must be open to work overtime to complete assigned tasks.

PREFERRED QUALIFICATIONS AND EXPERIENCE

- ◆ Minimum of two years industry experience preferably as a Loan Processor.
- ◆ Working knowledge of Data Trac systems.
- ◆ Excellent verbal and written communication skills
- ◆ Ability to work independently in a fast-paced environment.
- ◆ Intermediate experience with Microsoft suite of products
- ◆ Excellent Internal and External Customer Service
- ◆ Resourceful
- ◆ Be able to work as part of a team
- ◆ High level of integrity
- ◆ Adapts well to change