

CDF Capital Job Description

Title: Loan Coordinator
Reports to: Loan Administrator
Department Loan Closing
Classification: Full-Time / Part-Time
FLSA: Non-Exempt

Position Summary

The Loan Coordinator works with the sales, underwriting and operations teams to document and close loans as well as provide customer service and personal attention to all borrowers. Works under the close supervision of the Loan Administrator and uses initiative and independent judgment within established policy and procedural guidelines.

Essential Functions

- Ability to provide excellent customer service via phone and email
- Process all new loan approvals assigned for documentation, initiating loan files and coordinating closing with appropriate internal staff and third parties.
- Submit orders to vendors for Title Insurance, loan documents, environmental reports, flood tracking and appraisals.
- Submit invoices to AP for payment to vendors for Title Insurance, loan documents, environmental reports, flood tracking and appraisals.
- Follow-up with Borrowers and Vendors on loan documentation contingencies not cleared prior to closing.
- Follow-up with Borrowers and Vendors on insurance certificates.
- Maintain MS CRM, ProcessStreet tracking/reporting for loan portfolio and closing pipeline
- Prepare files for annual audit(s)
- Maintain physical and digital files for active and archived loans.
- Perform special projects and other duties as assigned

Key Qualifications

- A living, vital faith in Jesus Christ and a desire to Help Churches Grow
- Minimum two years college education or equivalent combination of education and experience
- Minimum two years of proven customer service experience with increasing responsibility
- Detail-focused with proven critical thinking skills and the ability to complete tasks with a high degree of accuracy and energy
- Proven ability to adjust to multiple demands, shifting priorities, ambiguity, and rapid change to reach ultimate team objectives
- Strong oral, interpersonal and written communication skills
- Strong computer skills including experience with Word, Excel, and MS Outlook.
- Strong organization and time management skills
- Action and team oriented; ability to work independently and as part of a team

Preferences

- Experience using LaserPro
- Real Estate transaction, lending, title insurance experience
- Notary Commission

CDF Capital Job Description

Growth in the position includes:

- Work with Loan Servicing to process payoff requests and facilitate release of security instruments
- Coordinate loan recording for borrower, interfacing with the Title Company, Escrow Company or attorney at closing
- Identify improvement opportunities specifically related to job function and implement recommended solutions.

Working Conditions

The physical demands described here are representative of those that must be met by the employee to successfully perform the essential functions of the position. Reasonable accommodations may be made for individuals with disabilities to perform the essential functions.

The employee must sit for prolonged periods, and stand, walk reach, twist, turn, bend, and stoop in the performance of daily office activities. The employee must be able to grasp, use repetitive hand movements and fine coordination to use a computer keyboard. The position also requires the employee to use near vision in reading correspondence, data and using a computer. Hearing is required when communicating by phone and/or in person. The need to lift, drag, and push files, paper and documents weighing up to 25 pounds is also required.

General Information

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all duties, responsibilities, and skills required of personnel so classified.