CDF CAPITAL™
Helping Churches Grow
Since 1953

Title:	Loan Servicing Specialist I
Reports to:	SVP Loans & Compliance
Department:	Loan Servicing
Classification:	Full-Time/Non-Exempt
Location:	Irvine, CA (This is not a remote or hybrid position.)

Position Summary

This role supports loan operations by managing payment processing, customer communications, and compliance monitoring across multiple systems. Responsibilities include posting and reconciling transactions, coordinating loan bookings and statements, maintaining accurate data, and ensuring adherence to loan covenants, insurance, and tax requirements. The position also involves resolving customer issues, collaborating with internal teams, and contributing to process improvements and special projects.

Essential Functions

- Handle incoming phone calls from customers, title companies, and financial institutions.
- Post incoming payments (check, ACH, wire) and process outgoing payments, including loan advances, participant remittances, and construction draws in the Phoenix Banking System.
- Review and advance loan bookings; prepare and deliver settlement statements for new loans.
- Respond to payoff inquiries and complete reconveyances per title, county, and state requirements.
- Review, validate, and reconcile daily transaction and accounting reports to ensure accurate system processing.
- Process monthly rate reviews in accordance with procedures and customer covenants.
- Maintain accurate data across CRM, Construction Project Portal, cash forecasting tools, and Phoenix Banking System.
- Review, correct, and upload monthly customer statements.
- Analyze financial reports from third-party capital partners to ensure loan participation compliance; follow up on discrepancies and fund collection.
- Monitor loan covenant compliance and address issues with internal staff and borrowers.
- Maintain and report on collateral insurance; follow up on expired policies and initiate force-placement as needed.
- Monitor property tax records for high-risk borrowers to ensure compliance.

- Track and reconcile past due loans; report monthly on delinquencies and unfunded commitments.
- Support Management, Sales, and Credit teams to ensure accurate and timely customer communication.
- Resolve complex customer issues, including delinquency collections and insurance claims, using negotiation and problem-solving skills.
- Stay current on operational systems and recommend process improvements.
- Perform special projects and other duties as assigned.

Qualifications & Requirements

- A living, vital faith in Jesus Christ and a desire to Help Churches Grow
- 2 years of experience in banking, finance, or administrative customer facing support
- Strong attention to detail and organizational skills
- Excellent written and verbal communication skills
- Proven ability to thrive within a team environment
- Strong MS Office (Word and Excel) skills required, CRM experience is a plus.
- Tech-savvy and adaptable; to navigate in-house reporting tools, digital storage platforms, and web-based systems, with a willingness to learn new technologies and processes
- Ability to manage multiple tasks and meet deadlines
- Eagerness to grow in a fast-paced, collaborative environment
- Associate degree in Business, Finance, or related field