

Business Area: Commercial Lending

Functional Title: Commercial Loan Administrator (CLA) – San Francisco

Position Summary: As a member of a Commercial Banking Team, the CLA is responsible for providing administrative and client service support to the Loan Officers and Team Leader in support of their respective roles and responsibilities. The CLA will also perform other tasks/projects as requested, and provide assistance as needed to other teams.

Roles & Responsibilities:

Provide assistance to lenders in all aspects of Portfolio Management/Credit Quality and New Business Development. In this role, the CLA must demonstrate excellent organizational skills, attention to detail, and the ability to multitask. Specifically, responsibilities include: 1) Processing loan advances, loan payments, payoffs, account transfers and any other client requests in a timely manner, 2) assisting with the tracking/collection of client information and monitoring delinquencies, 3) tracking and updating insurance coverage on loans, 4) insuring the accuracy and completeness of loan set-up/renewal information on the loan system and 5) tracking policy and loan document exceptions and assisting in clearing them.

Interact with clients, external centers of influence (accountants, attorneys, advisors, etc.), and other support areas of the Bank via telephone, e-mail and in person to provide superior service. The CLA must be personable, polite and have a patient demeanor, and possess strong communication skills. Specific responsibilities include: 1) handling routine inquiries and client service issues promptly, and 2) providing phone coverage and taking messages.

Provide clerical and technical support for the lenders and team leader. In addition to basic duties (word processing, filing, copying and appointment management), the CLA will be responsible for proper set up and maintenance of client credit and legal files. In this role, the CLA will have a familiarity with basic loan documents. The CLA also provides key technical support through: the preparation of credit applications, portfolio and pipeline reports, and marketing presentations. In this role, the CLA must possess strong computer proficiency.

Qualifications:

Prior work experience; experience within a commercial bank environment is preferred
Associates Degree and/or graduate of a professional secretary or administrative assistant school preferred.

Computer proficiency and comfortable using technology.

Strong communication and organizational skills.

Proficient in multi-tasking in a team oriented environment focused on the highest standards of client service.

Professional in manner and appearance